MATCOM Contact Center

User Manual

Version 1.0 - Pre-Pilot Draft

Project Information

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1.0 Introduction

1.1 DOCUMENT OVERVIEW

Conceived as a result of the governing Integrated Logistics Capability (ILC) and the Marine Corps Logistics Operational Architecture (OA), MATCOM Contact Center is intended to provide Marines and Marine Corps support personnel with the ability to track customer inquiries (requests) from creation to closure. This capability will allow inquiries to be sourced and resolved in an efficient and effective manner. The sources of inquiry resolution will be transparent to end using customers who generate the inquiry (SR). In the end, the overriding mission of the MATCOM Contact Center is to operationalize the business process requirements and changes that have been dictated in the OA.

To do this, the MATCOM CRM Group will utilize the Oracle 11i Application suite including the following modules: Oracle iSupport, Oracle TeleService, and Oracle Workflow (in conjunction with the EV Pilot specifications). Working together, these applications will support personnel by delivering the capability to create and track customer inquiries (SRs). The primary goal of these applications is to provide end-to-end visibility into inquiry resolution. Having established end-to-end visibility, the Marine Corps will be better able to facilitate inquiry prioritization, inquiry distribution, and ultimately inquiry resolution.

1.2 DOCUMENT PURPOSE

This document provides the Marine Corps with the user manual necessary to support the successful implementation of the Customer Service Management functional flows within the context of the Contact Center capability. In particular, this document will outline the purpose, objectives, and processes necessary to provide the MATCOM CRM Project user community including the Supported Unit (e.g. 6th Marine Regiment), Supporting Units (e.g. 2nd FSSG) and Administrators with the competence and confidence to use the tool correctly, productively and efficiently upon the completion of initial training.

Specifically, the User Manuals will arm the user groups with the instruction required to perform their assigned tasks within the system. It is important to note that the Project Team has automated many of the existing processes, thus reducing the required level of user intervention through a decrease in touch points and number of corresponding training requirements.

This document should serve as a supplement to user training and is not intended to replace training. The document will describe many of the basic procedures that a user will need to understand within the Oracle applications. Additionally, it will display how the application will be used to perform the OA compliant business process and provide screen shots of the applications for users to reference while performing the process.

2.0 Functional Basics of Oracle forms-based Apps

The purpose of this section is to provide users with examples of some of the basic features/navigations of the Oracle forms-based software. This section serves as a reference point for any user who requires navigational how-to instructions in order to begin using any of the Oracle forms-based modules (i.e. TeleService, Order Management, Inventory). For the purposes of the current Extended Validation and MATCOM Contact Center system rollout efforts, this includes, but is not limited to, 2nd FSSG OMs, 2nd FSSG MCMs, MATCOM CRM Users, and MATCOM SME Users.

2.1 Downloading Oracle JInitiator

To access the forms-based Oracle Applications (i.e. TeleService), it is necessary to have the Oracle JInitiator software installed on each user's personal computer. This software can be downloaded directly from the Oracle Corporation website. The URL that contains the download for Oracle JInitiator is http://otn.oracle.com/software/content.html

JInitiator is currently listed on the right hand side of this web page under the category "Technologies, Utilities, and Drivers". To be able to access this download, it is necessary to register as a user of the Oracle Corporation web page. Registration is free and after clicking on the JInitiator download, each user will be prompted to either login to the Oracle web page (for return visitors) or register to use the web page (for first time visitors). Once registration is complete, a user may download the Oracle JInitiator software by clicking on JInitiator and following the instructions on the screen.

It will be necessary to ensure that the proper version of Jinitiator is installed. The version used for the USMC implementation is (as of Jan '03) version 1.1.8.16. The user will have to click on the link to the jinit11816.exe in order to perform the download. The download process will ask the user to choose to run the download (i.e.: install) the Jinitiator from its present location, or save the executable to their computer. The user can choose either option. If the user selects to save it to their computer, they'll have to remember to launch the executable after it's saved.

In order to perform the installation of the download, the user will have to follow the instructions, clicking the 'Next' button as each stage of the install is performed. The user will be asked if he/she would like to install the software in the 'default' locations. It is recommended to follow this procedure. In other words, the user can click the next button until the install has completed successfully.

Attention: Jinitiator is only required for Oracle's forms-based applications (i.e. TeleService, Order Management, Receivables, etc.). If you are accessing a web-based module (i.e. iSupport, iStore) than a download of Jinitiator is not required. In accordance with your functional role, if you are a Supply Officer or Requestor who only requires the ability to submit requests than you will ***not*** need to download Jinitiator.

2.2 LOGGING INTO ORACLE APPS

Attention: The process of logging into Oracle Apps (including responsibility selection) will vary depending on the user's functional role. For example, if you are a 2nd FSSG OM user who is trying to access a service request, you will initially need to login through the portal. These instructions can be found in XXXX training documentation. As a user who initially logs into the portal you will follow the logon instructions in this section only ***after*** clicking on the link to your Oracle Apps responsibility through portal. Direct login to Oracle Apps through the Oracle URL address pertains to MATCOM CRM or SME users ***only***.

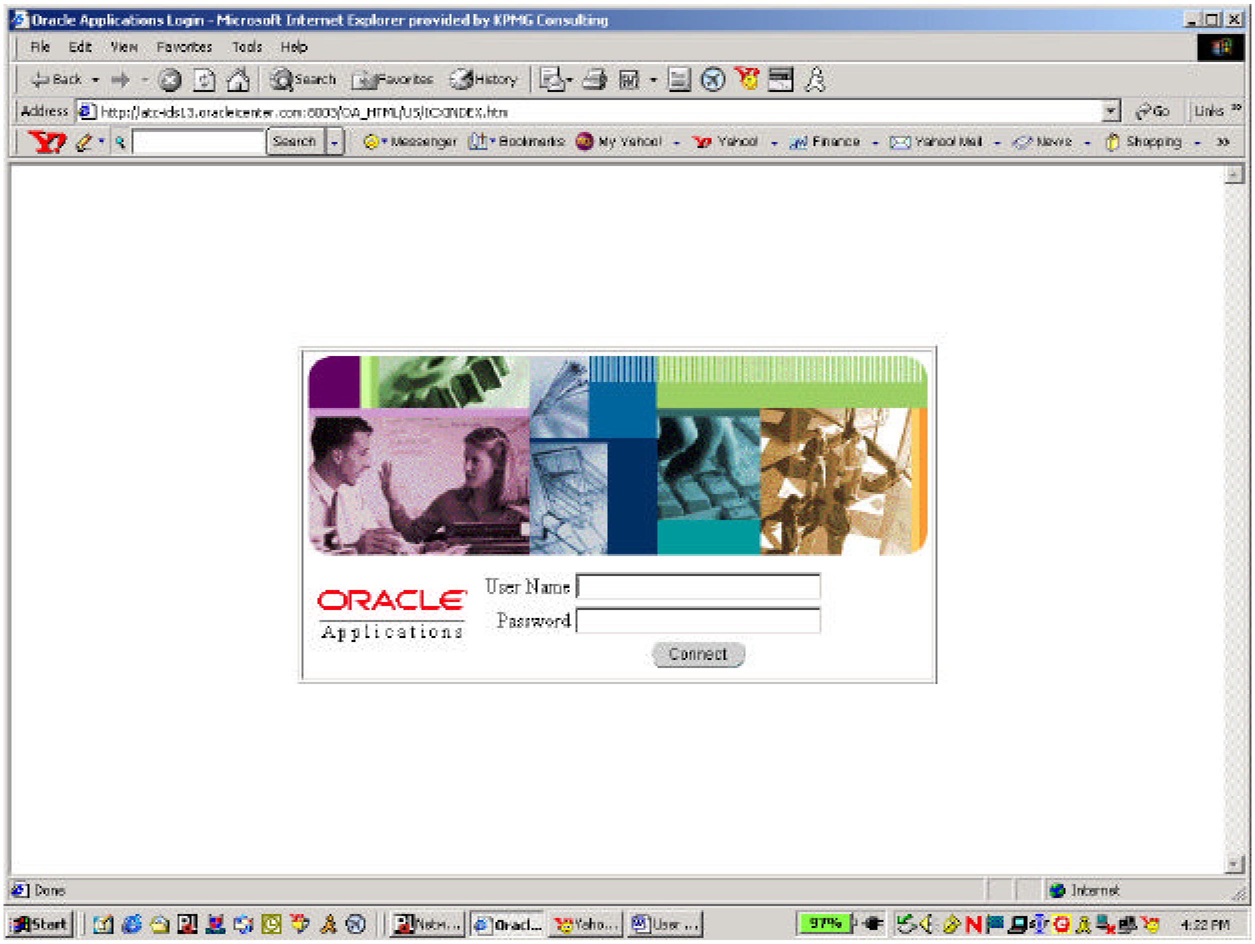
To navigate to the Login screen for the Oracle TeleService Application, please enter the following URL in your Internet Browser:

http://atc-ids13.oracleicenter.com:8003/OA_HTML/US/ICXINDEX.htm (Note: This is the URL of the Test (8003) Instance)

Once the Login screen appears, a user will need to enter his/her User Name and Password to access the application. The User Name and Password are set by the System Administrator. For the USMC Expanded Validation and MATCOM Call Center efforts, the default password is 'welcome' and user names will be created in the following standard format:

User Name: FirstName.LastName

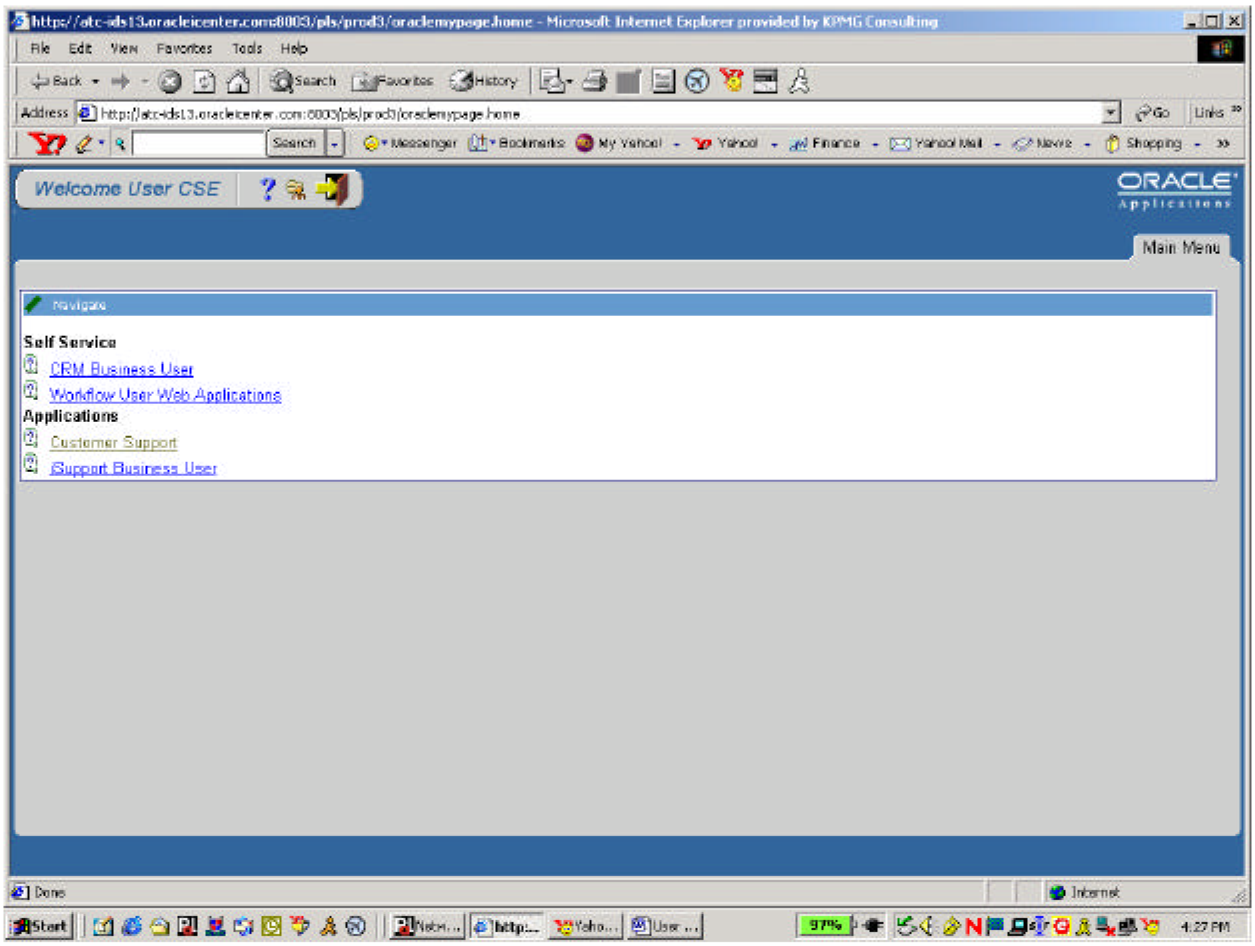
To access the applications, simply type your User Name and Password in the corresponding boxes and use the mouse to push the “Connect” button at the bottom of the screen. Below is a picture of the screen that the user will see at the Login Screen.



2.3 ORACLE APPS LOG-IN WELCOME NAVIGATOR SCREEN

Attention: If you have only one responsibility assigned to your user account in the Applications than you may not see the Welcome Navigator screen after initial login. Oracle will pass you directly to the forms navigation area associated to your assigned responsibility.

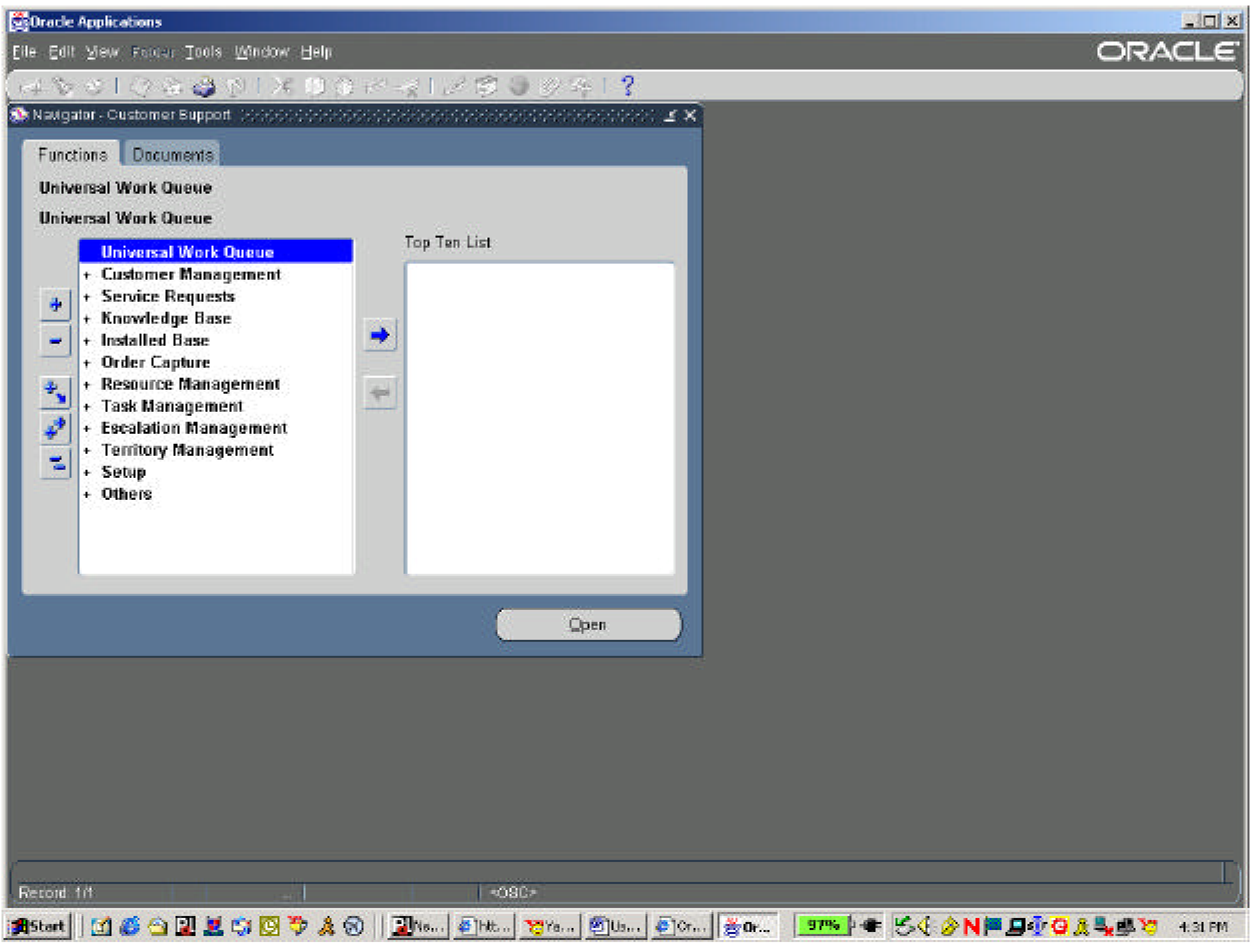
After successfully logging into the application following the process described in section 2.2, the next screen that appears is the welcome screen. The primary options on the welcome screen are to navigate to an assigned Oracle responsibility from the list of available responsibilities or to exit the Oracle Applications by using the door icon at the top of the screen. Below is an example of the welcome screen:

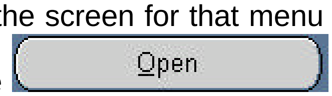


2.4 RESPONSIBILITY NAVIGATOR SCREEN

Attention: Whether the user logs into Oracle Apps directly or through the portal, this section pertains to both login methods.

To accomplish a task in the system, users should double click on the responsibility corresponding to his/her organizational group and associated role-based forms access. Wait for the navigator screen associated with the selected responsibility to appear. This screen provides a list of available menu options within the responsibility. An example of the responsibility navigator screen is shown below. Please note that the forms navigation screen associated to your responsibility may not look identical to this example:



Double clicking on an expanded menu item will open the screen for that menu item. Similarly, highlighting an expanded menu option and pressing the 

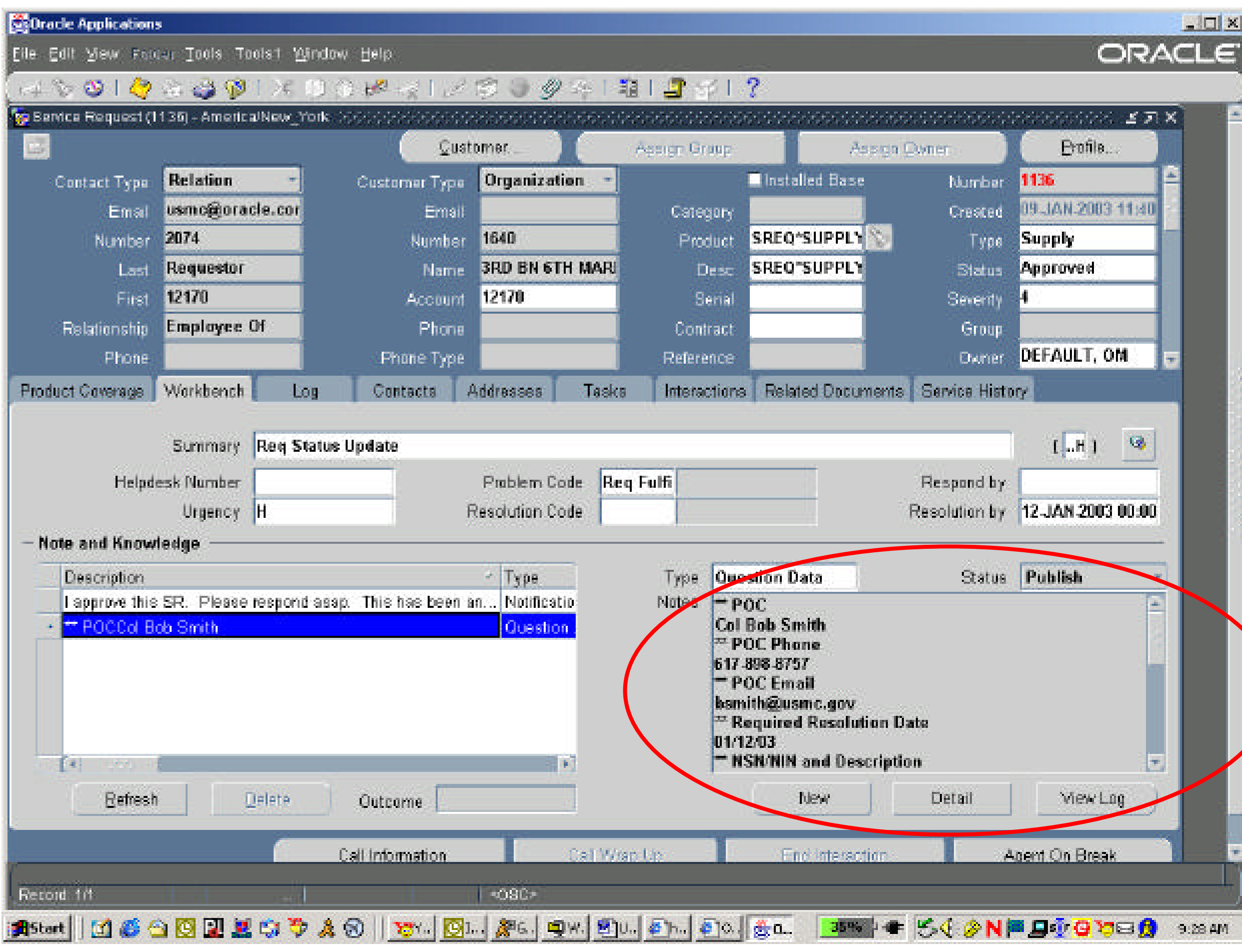
button will also open the screen underlying that menu option. Menu options may be placed on the “Top Ten

List" (the list of shortcuts) for easy reference by highlighting the option and pressing  in the middle of the screen. Similarly, to remove menu options from the "Top Ten List" a user may highlight an option on the list and press  in the middle of the screen.

2.5 ORACLE FIELD ENTRY METHODS

Free Form Field Entry

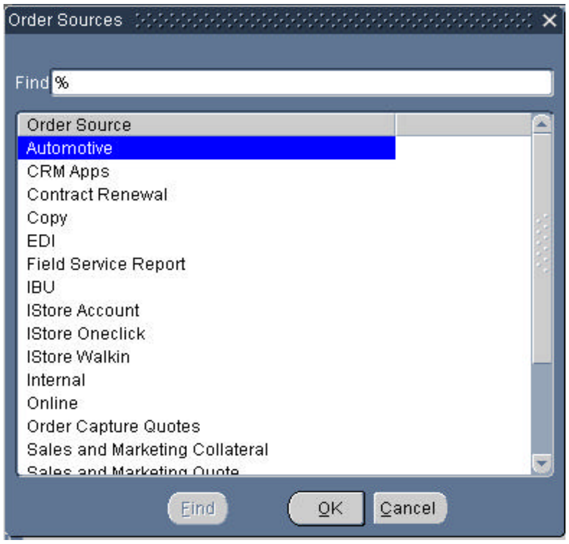
Some Oracle fields do not validate against pre-existing values contained in an Oracle Database table. In such cases, you can enter the text of your desired value in the field with the only limitation being the character length of the field. Primary examples of such fields include Service Request Summary, SR Task Name, and SR Task Description. Oracle generally does not require validation on any fields that are used to define a record in lemans terms. An example of the Service Request Summary field is shown below.



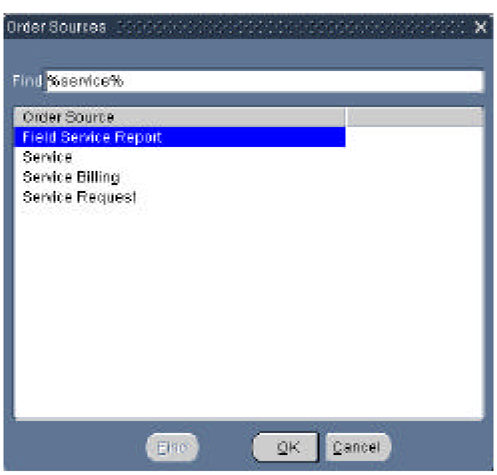
List of Values (LOV) Search Window

Some Oracle fields are validated against a set of pre-existing values as defined in the database.

If a field is pulling from a pre-existing set of values than you will see the ellipse symbol in the far right end of the field when your cursor is in the field. In this case, you will need to further refine the value you are entering into the field by selecting from the list of options provided after clicking on the icon. The list windows box will appear after clicking on the icon. It will look similar to the box shown below:



Within the list window, you can further reduce the available values by performing a search. To find a value containing 'service' where you don't know whether service is at the beginning or end of the list, enter the search criteria as %service% in the Find field. The percent sign [%] represents a wildcard search character in the Oracle Apps. If you are looking for a value that begins with 'serv' enter the search criteria as serv%. To find a value that ends in 'vice' enter the search criteria as %vice. After entering your search criteria click on the Find button. See the example below where the user narrowed the search criteria to include only those values containing 'service.'



List Of Values (LOV) Quick Entry

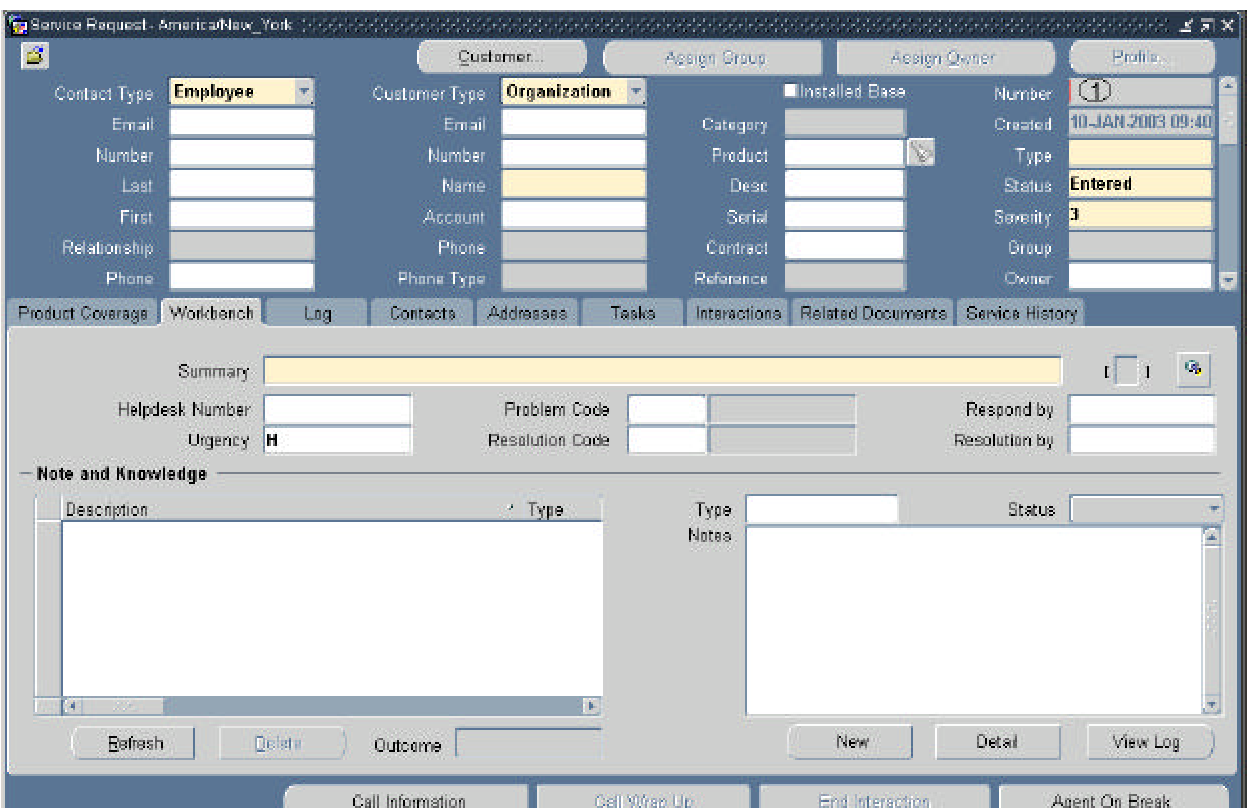
Alternatively, Oracle generally allows you to enter a part of the value directly into the LOV field without clicking on the icon. If you know the first part of the value you are entering than you can enter that value directly into the field. In the example provided above, the user could have entered 'Service Bil' directly into the Order Sources field and then clicked on the Tab button. Oracle would have auto-populated the rest of the value into the field. This method eliminates the need to click on the ellipse icon and further refine the search through the search window. Following these instructions you can significantly reduce your data entry time into LOV fields.

2.6 ORACLE RECORD QUERY MODE

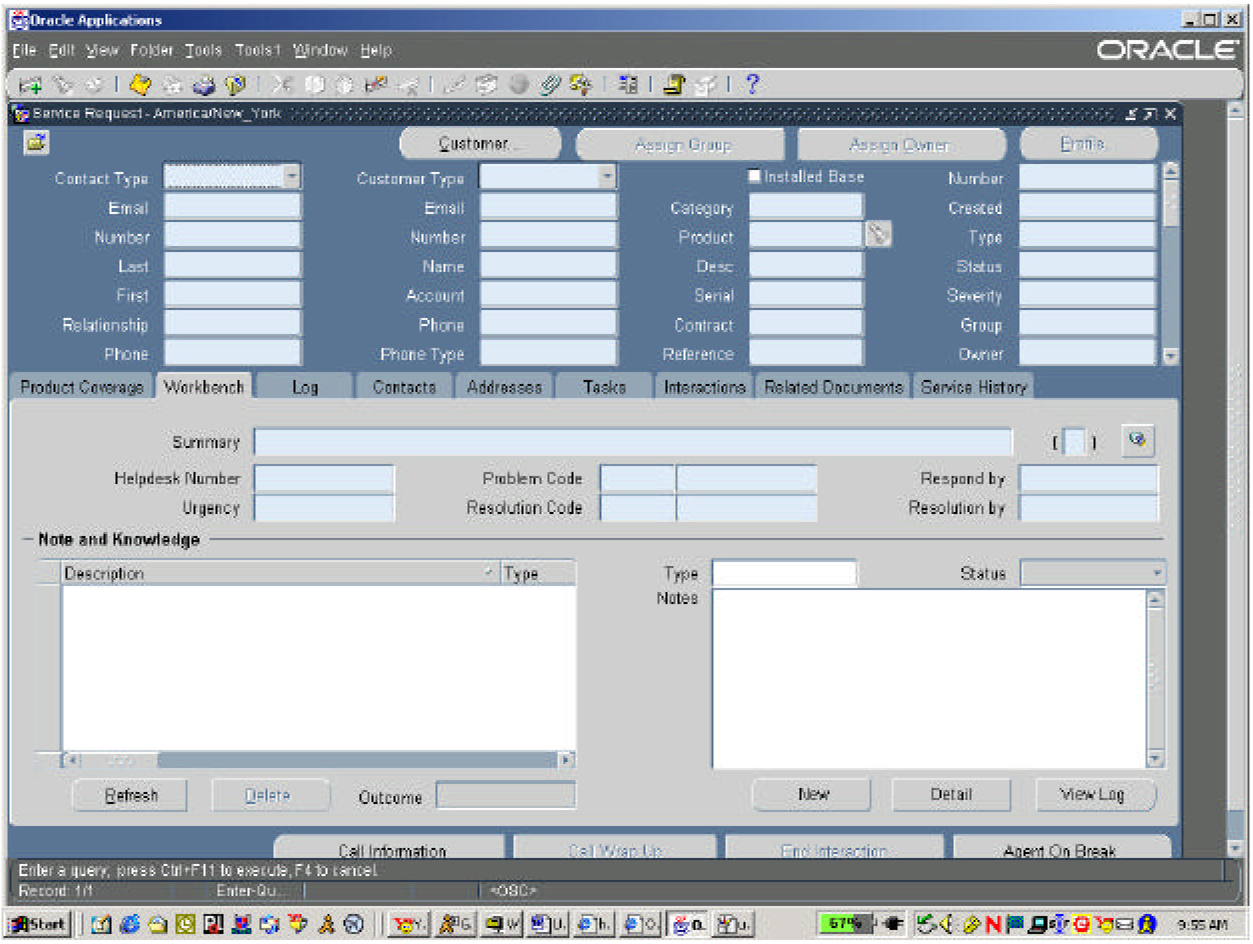
Query mode is part of Oracle's standard functionality. Query mode is useful for purposes of searching for a specific record or set of records contained within the database. Query mode can be used in almost all screens within the application except for screens that already have a find or search button. The process for using query mode is as follows:

As an example, a search for SR number 960 is demonstrated below.

1. Place the cursor into the field that you would like to run the query on

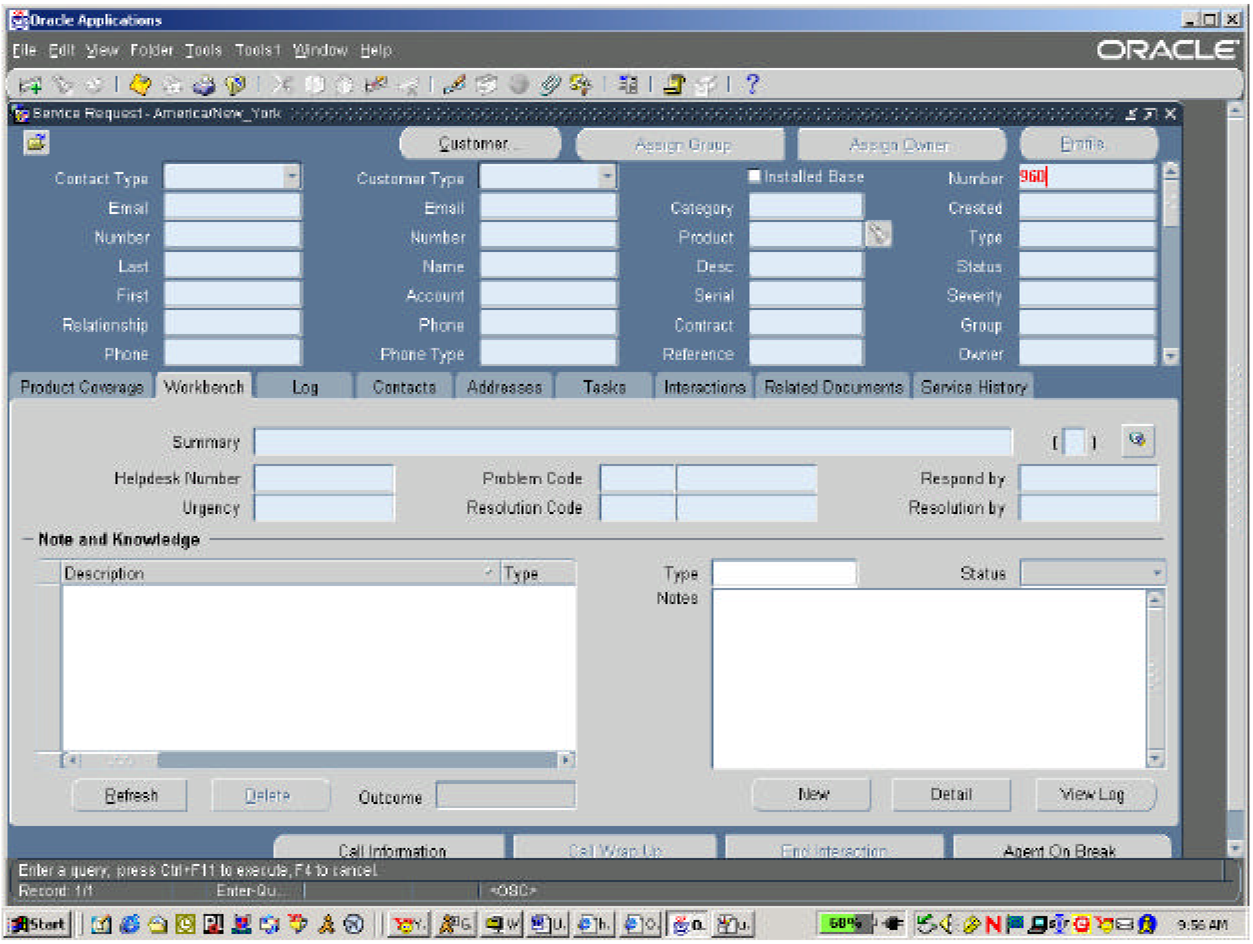


2. Press F11 and all the fields on the screen will turn blue



3. Enter the information that you wish to query for in the field that you wish to query on

4. Press Control & F11 simultaneously to run the query
5. If the search criteria entered on the form does not contain any results, no records will be retrieved. Otherwise, all applicable records that meet the search criteria will appear. Use the down arrow key to scroll through all retrieved records until you find the appropriate one.

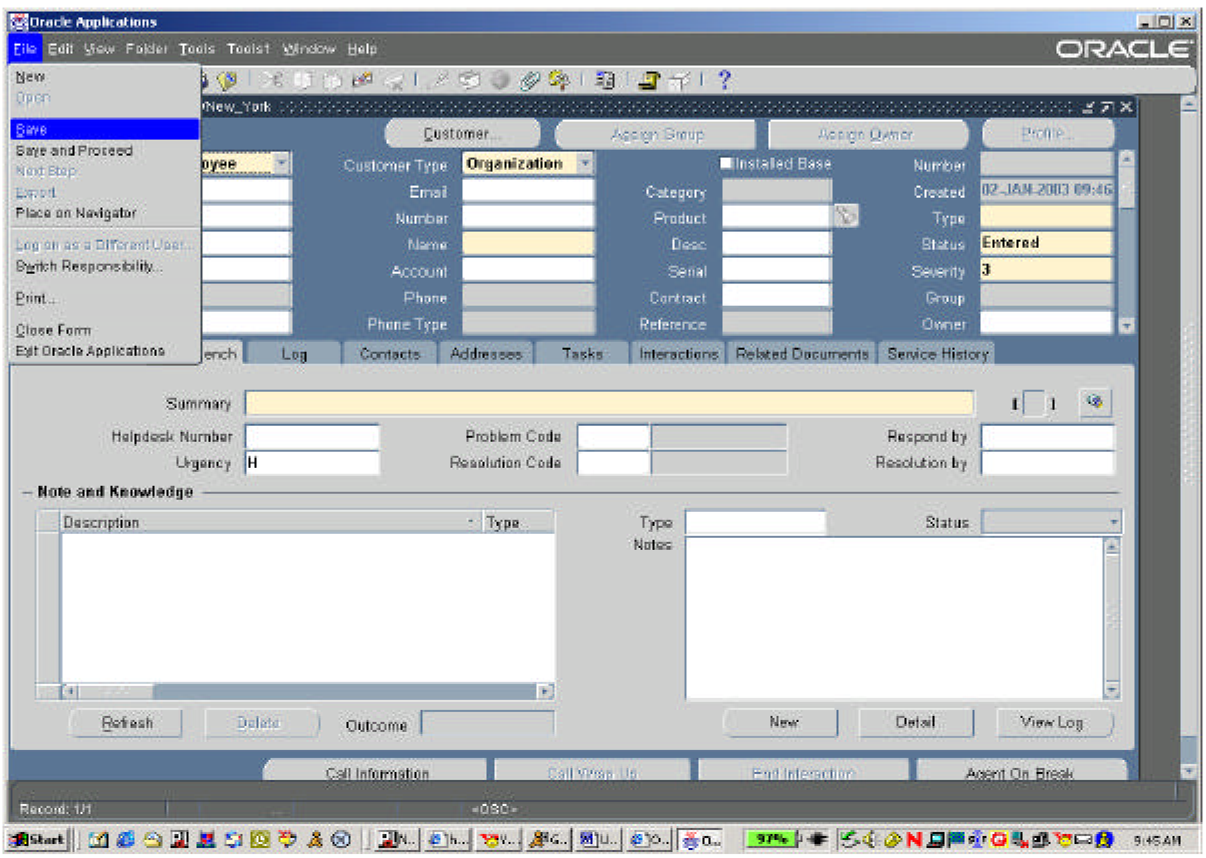


2.7 USING THE TOOLBAR TO SAVE, ERASE, AND DELETE

When using the Oracle applications, it is often necessary to save records, to erase entries, and to delete lines. The key difference in erasing entries versus deleting a line is that erasing an entry only removes text that has been entered and has not yet been saved or committed to the database. Deleting a line will remove the entry from the database after a record has been saved, however, not all lines are capable of being deleted and the software will provide warnings when a line cannot be deleted from the database.

Saving Records

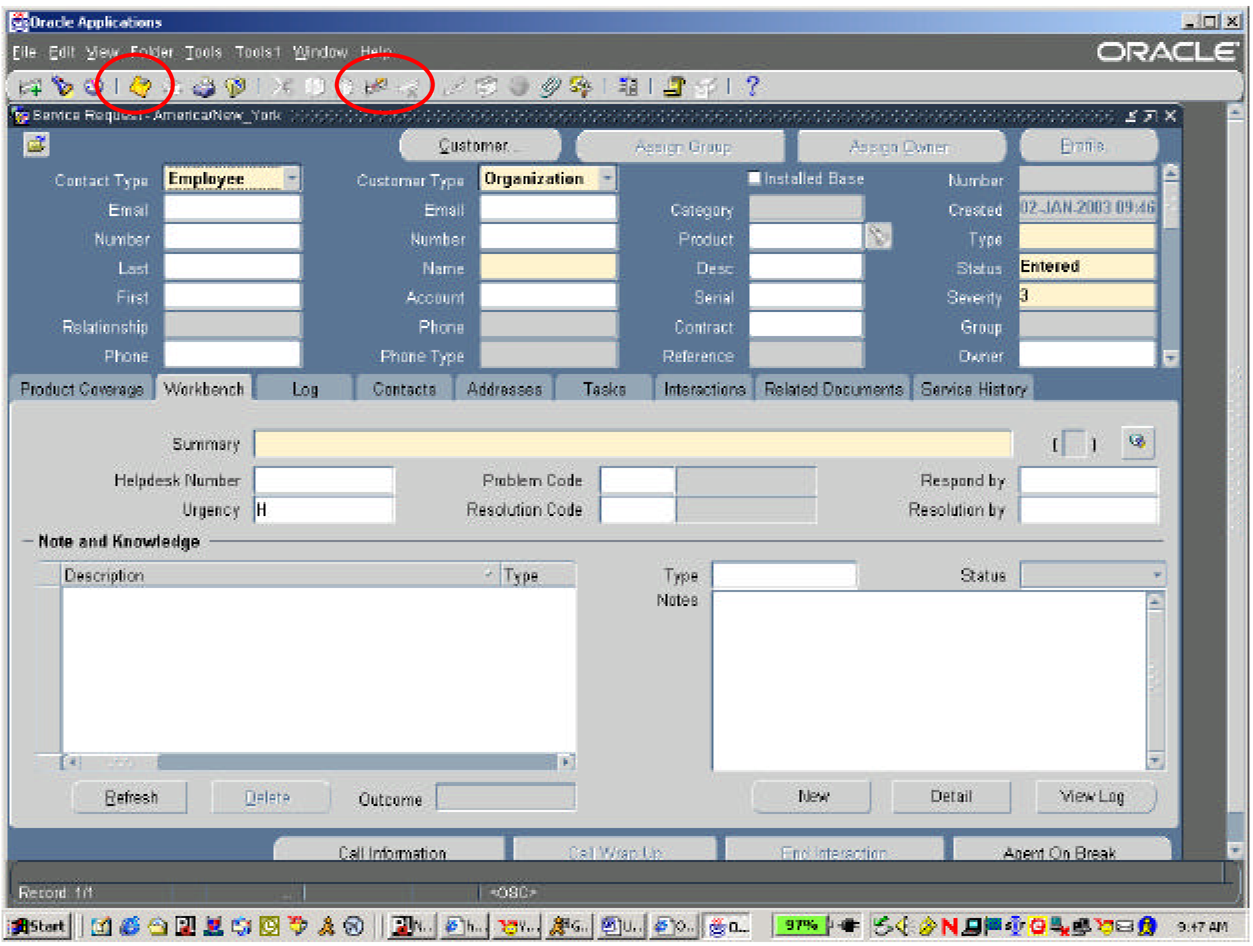
To save a record, a user may use the menu at the top of the screen or the shortcut menu bar. A user may save a record by clicking on the file menu and selecting the "save" option. Alternatively, a user may click on the  icon on the shortcut menu bar to save the record. In addition, the user can save by using the CTRL+S shortcut keys. An example is shown below:



Erasing Entries and Deleting Records

Entries are erased from your active form view by clicking on the  button in the shortcut menu bar and records are deleted from the database by clicking on the  button on the shortcut menu bar. These two icons are displayed in the circle in the picture below. Additionally, the save button shortcut is also enclosed in a circle.

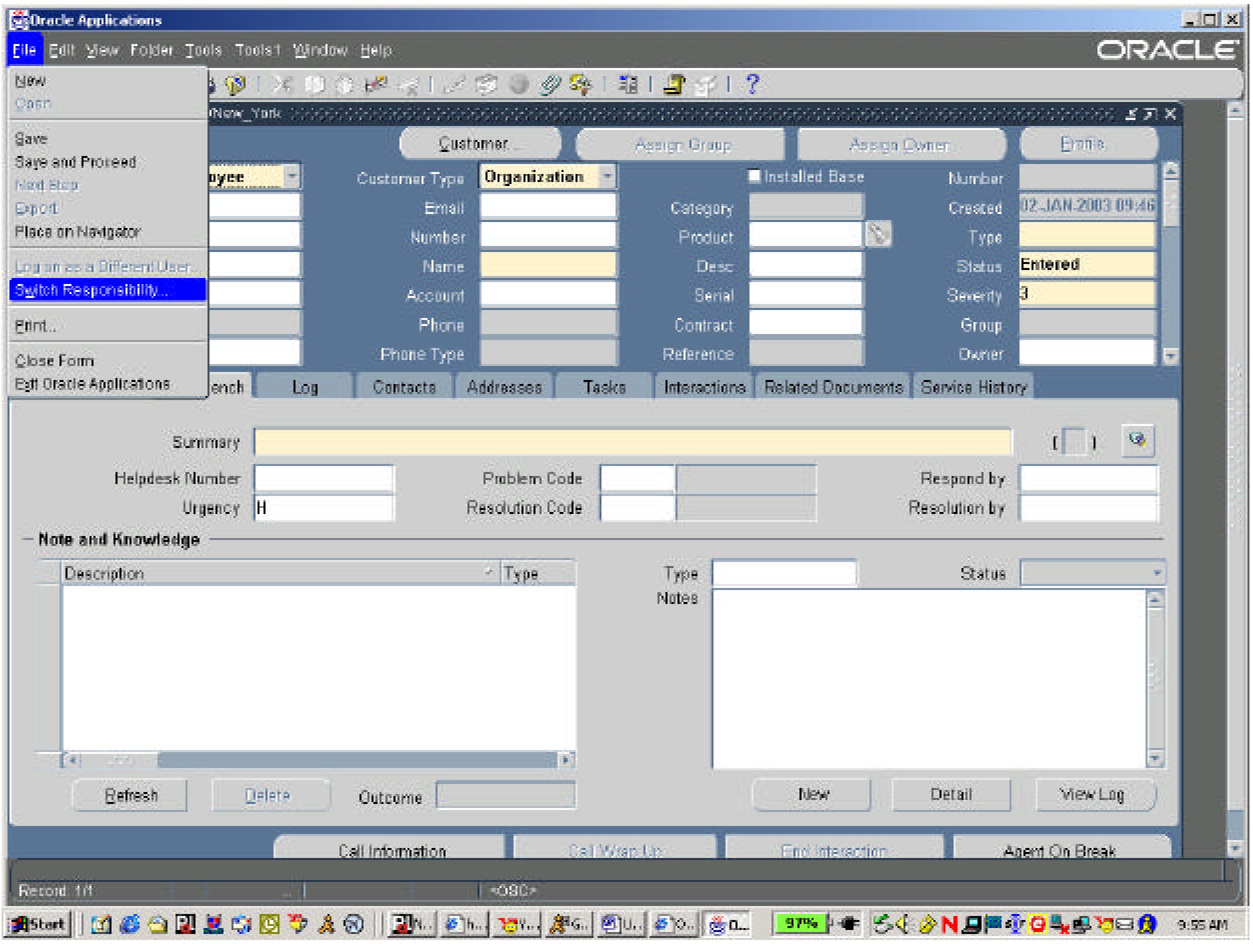
☞ **Caution:** It is recommended that you only delete a record if you are certain that you want to remove the record from the database. In most cases, using the eraser button will NOT remove the record from the database. The record may still appear after closing the active form and reopening it.



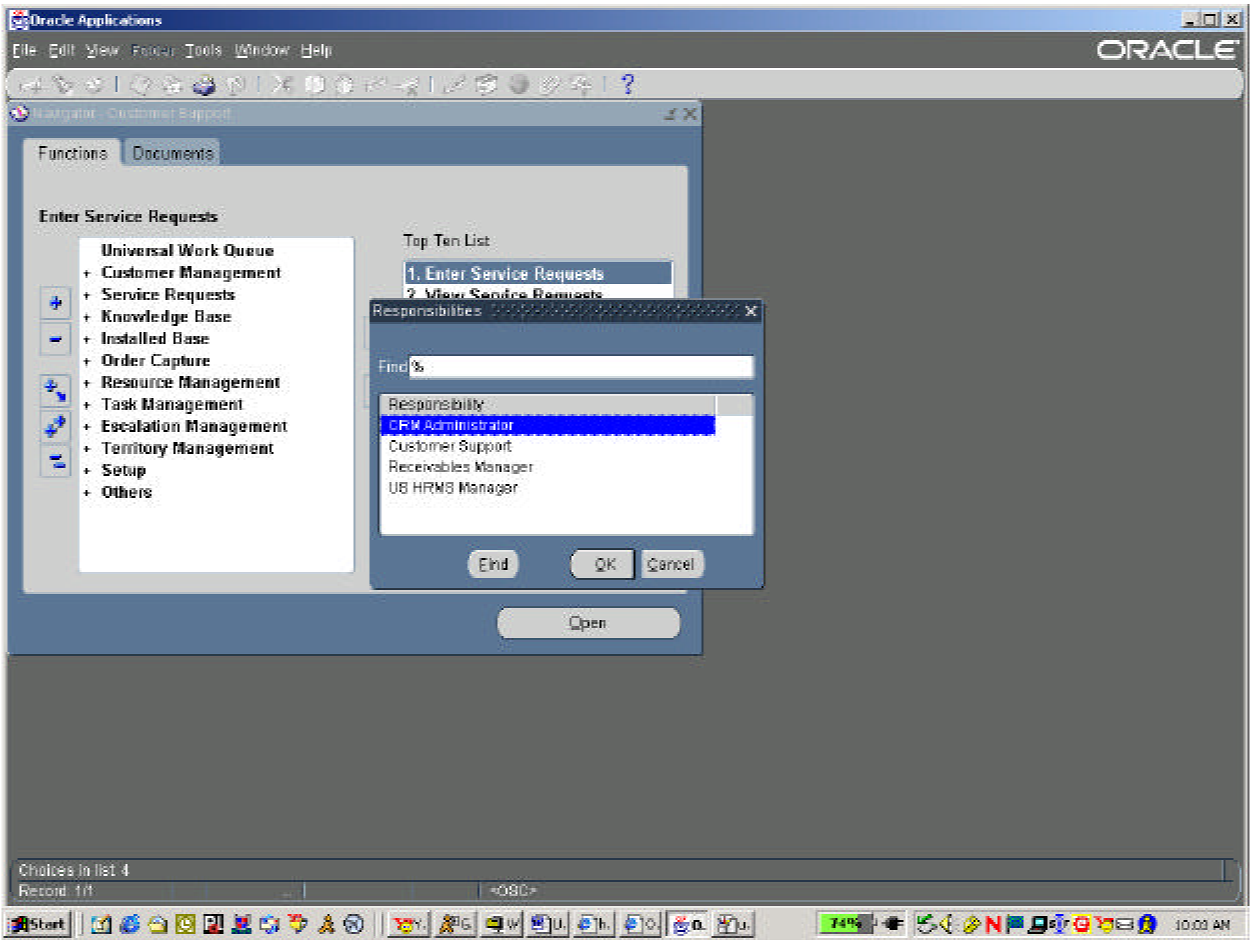
2.8 SWITCHING RESPONSIBILITIES IN ORACLE

Oracle has the capability to allow users to switch the assigned responsibility that they are using without logging out of the application. For example, a user that is assigned both the "Customer Support" and "Order Management" responsibility may switch from the Customer Support

Responsibility to the Order Management responsibility without logging out of the application. This procedure is completed by clicking on the File menu at the top of the screen and selecting switch responsibilities.



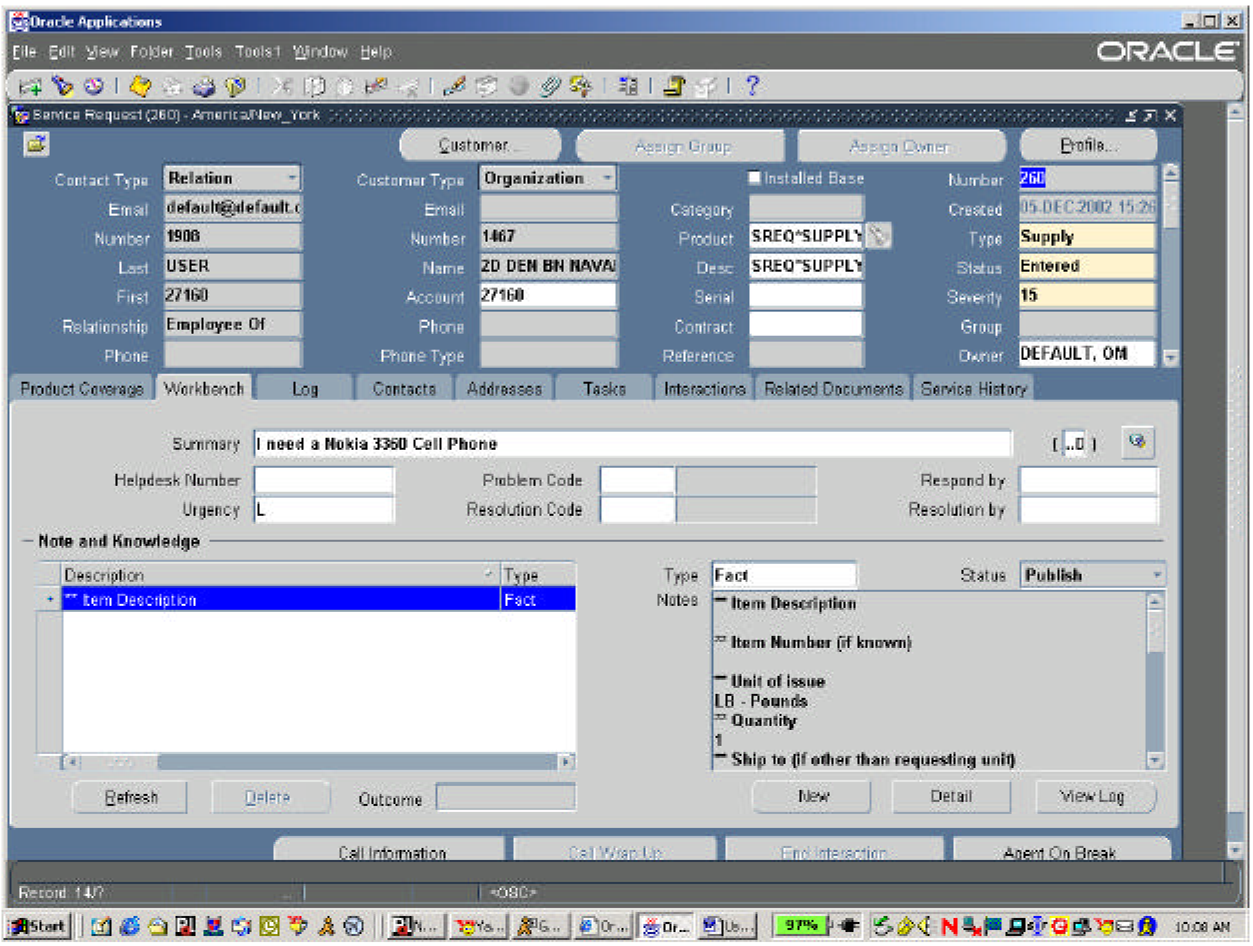
After selecting "Switch Responsibilities", the user will be taken to the navigator screen where they may switch their responsibility from a list of available responsibilities. An example of this screen is shown.

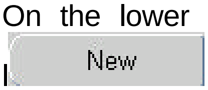
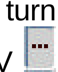

Oracle Applications
File Edit View Folder Tools Window Help
ORACLE
Functions
Documents
Enter Service Requests
Universal Work Queue
Customer Management
Service Requests
Knowledge Base
Installed Base
Order Capture
Resource Management
Task Management
Escalation Management
Territory Management
Setup
Others
Top Ten List
1. Enter Service Requests
Responsibilities
Find %
Responsibility
CRM Administrator
Customer Support
Receivables Manager
US HRMS Manager
Find
OK
Cancel
Open
Choices in list: 4
Record: 1/1

Section 3.0: General Oracle TeleService Procedures

3.1 EXCHANGING NOTES WITH A REQUESTOR

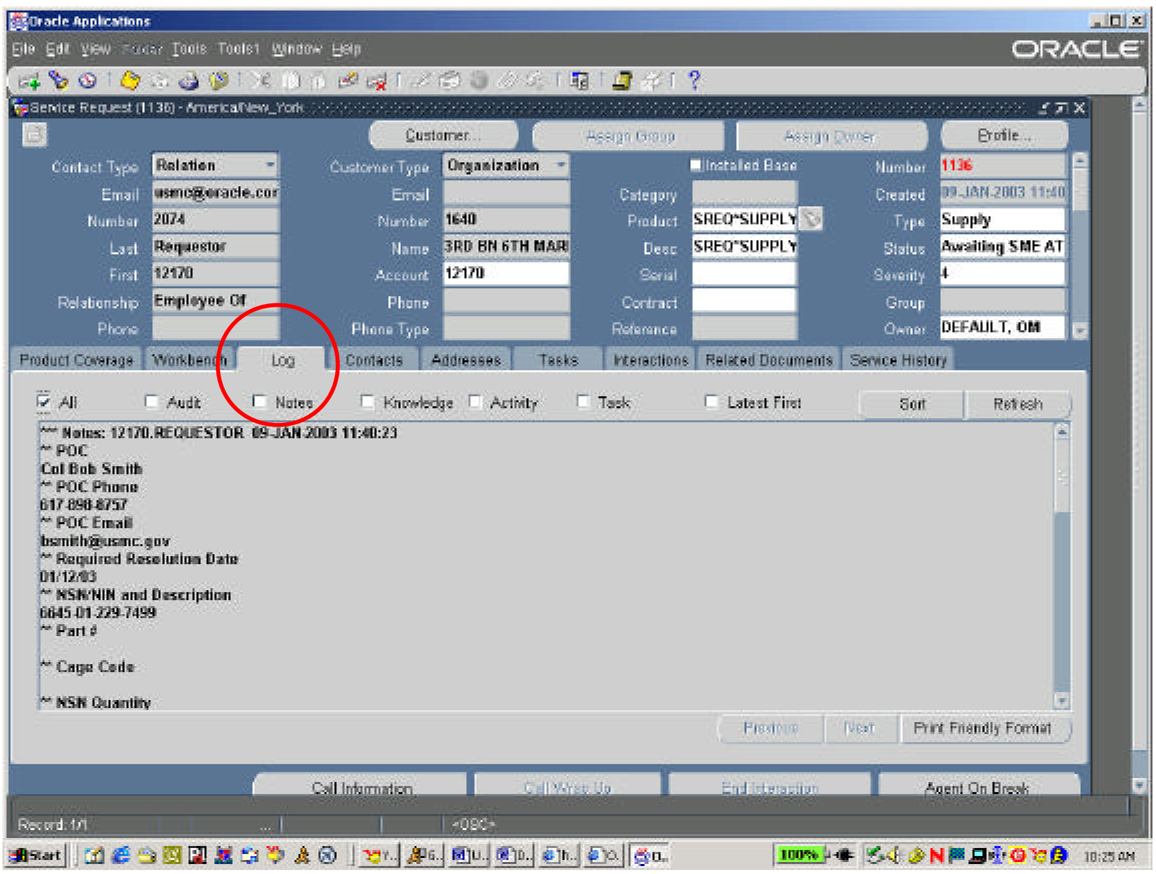
To pass a note to the requestor, first find the service request that you wish to work on by using the methods outlined in Section 2.3 of this document. After finding the appropriate service request, navigate to the “Create Service Requests” screen and make sure that the “Workbench” tab is showing. The screen will look like the picture below:



On the lower right portion of the screen is the Notes box. Under this box is a button  which is used to generate new notes. To create a note, click on the  button under the notes box. After clicking on this button, the Notes box will turn white. Once the Notes box turns white, the user may select a Note Type from the Type LOV  field and then may enter his/her note. After completing the note, the user may make the note viewable by the requestor by selecting “Publish” from the Status field above the Notes box. If the note is intended for internal inquiry resolution purposes and should only be viewed by internal Customer Support Resources, the user would select “Internal” from the Status field above the Notes box. After a new note has been created, published, and saved then it will appear in the description box on the left side of the screen.

3.2 USE OF THE “LOG” TAB

The “Log” tab can be found on the “Create Service Requests” screen next to the “Workbench” tab as shown in the picture below:

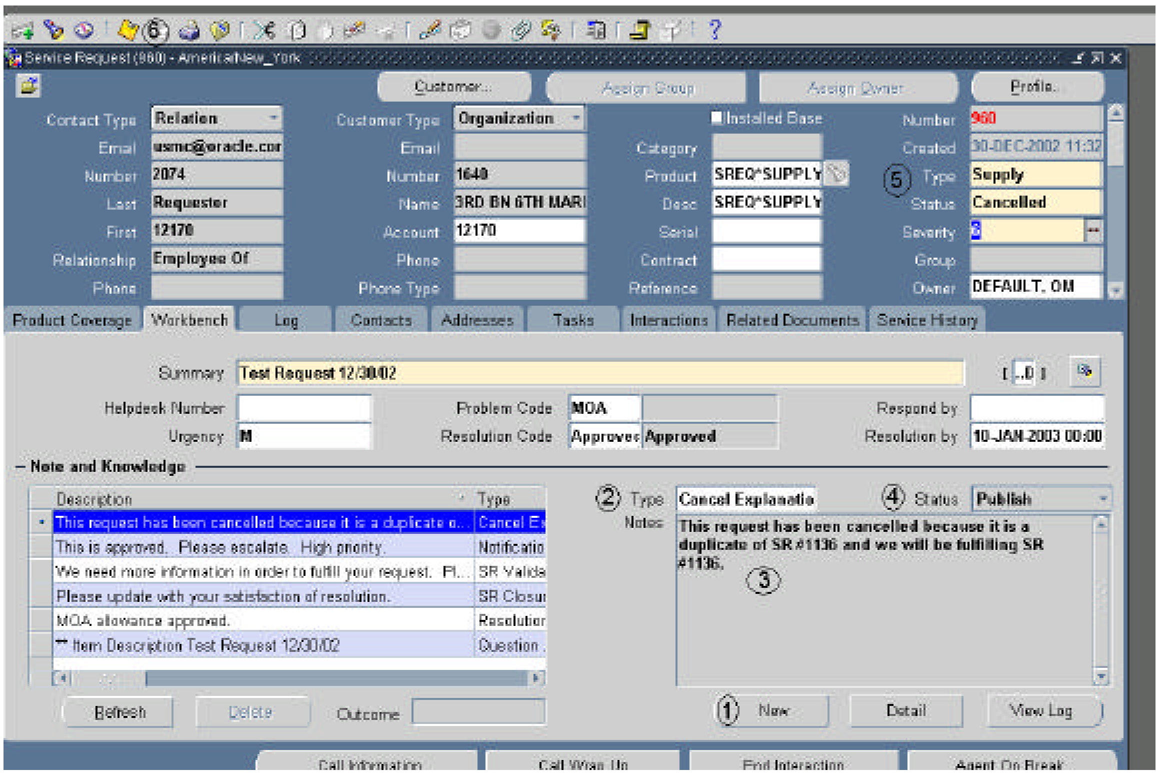


This tab is used to record notes, status changes, and updates associated with an SR. Thus, it acts as a recorder to record all of the history associated with a particular Service Request. Searches for particular details of a SR may be performed by selecting one (or more) of the check boxes labeled Audit, Notes, Knowledge, Activity, Task, and Latest First and pressing the

button. This sort will narrow the list of results and help users find the particular detail about a SR that they are looking for.

3.3 LINKING SRS USING THE RELATED DOCUMENTS TAB

SRs may need to be linked. One prime example of when SRs need to be linked is when two SRs are submitted for the same request by mistake. When this occurs, one of the duplicate SRs will need to be cancelled and then linked to the SR that remains active to be worked. Suppose that SR #960 is a duplicate of SR #1136. To cancel SR #960, the user will want to locate SR #960 and then add a note to the SR stating that it has been cancelled and why it has been cancelled. Also the user will want to change the status of the SR to cancelled and save the record.

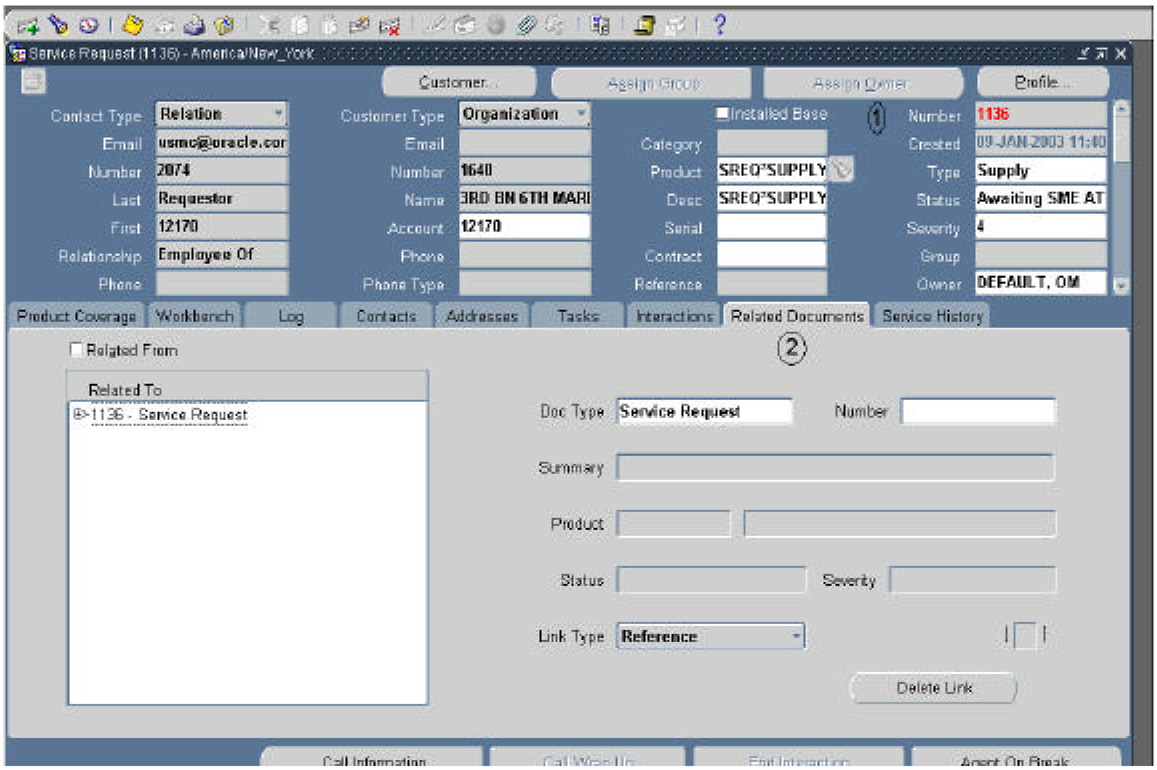


1. New - Used to generate a new note
2. Type – Cancel Explanation is the type of note that the user will write.
3. Notes – The user will enter a description for the cancellation.
4. Status – The user should change the Status of the note to “Publish” so the note is published on the SR for all to view.
5. Status – The Status of the SR should be changed to Cancelled.
6. Save – The record should be saved to update the changes.

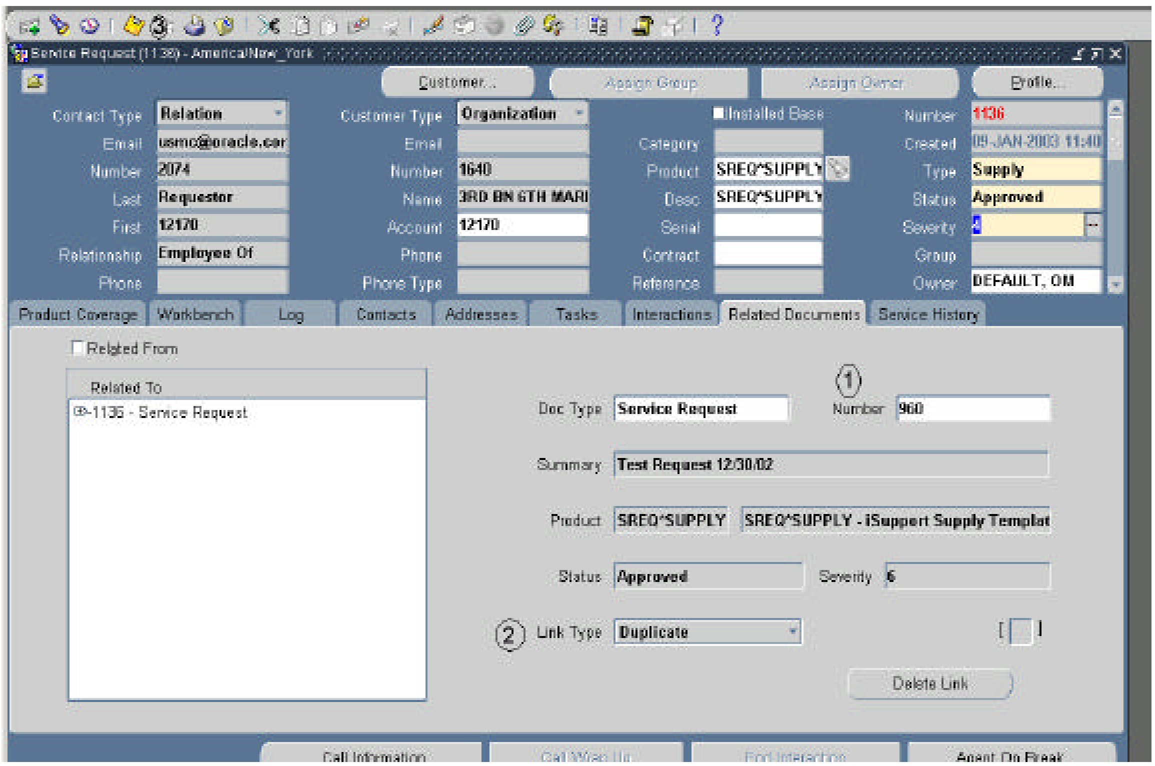
Once SR #960 has been cancelled, it can be linked to SR #1136 since #1136 is being used in place of #960.

To link SR #960 to SR #1136.

1. Locate SR #1136
2. Navigate to the “Related Documents” tab



Once on the appropriate tab, the user may proceed to link the two SRs.

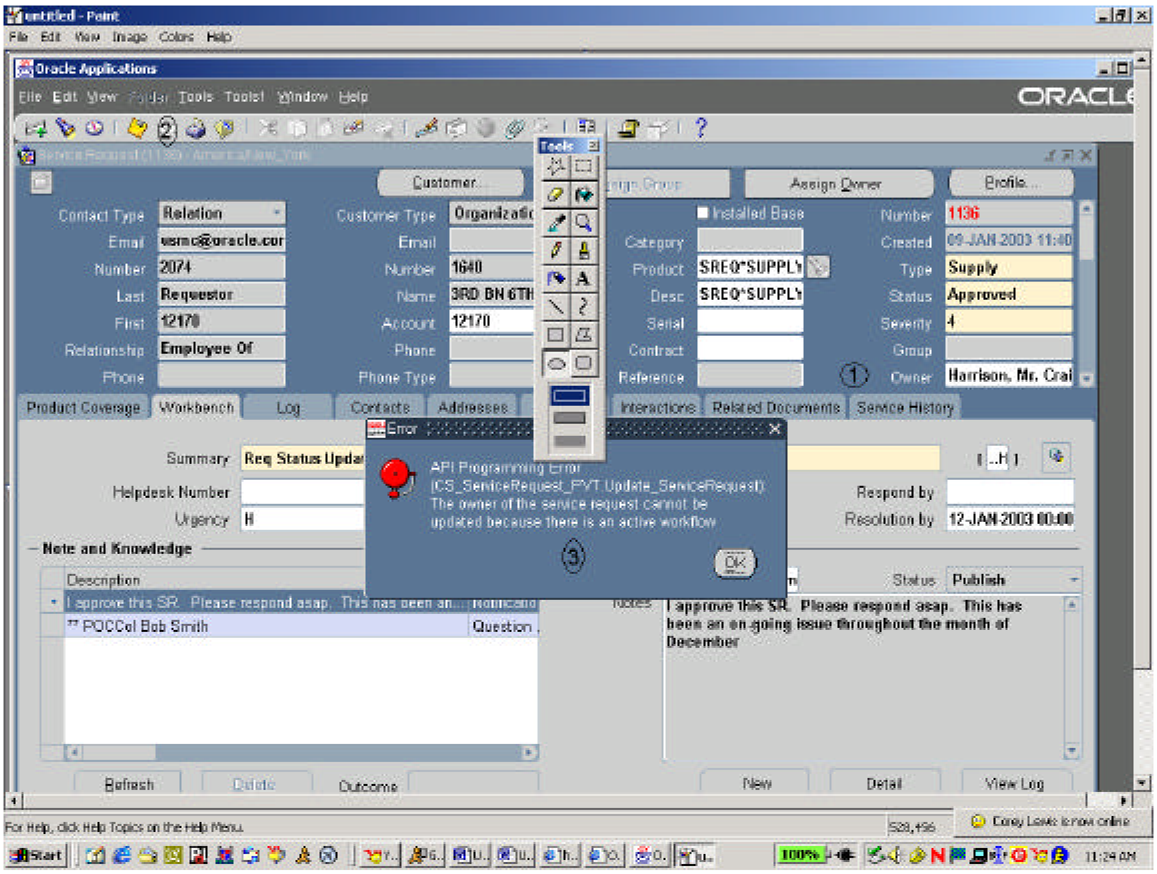


1. Number – Enter the SR number to link to the SR showing in the related to window. In this case, the user is linking SR #960 to SR#1136.
2. Link Type – Select the link type. In this case, we are assuming that SR #960 is a duplicate of SR #1136.
3. Save – Save the record to record the link.

3.4 SR OWNER

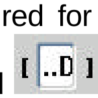
3.4.1 Incorrect Procedure for Changing Owner of a SR

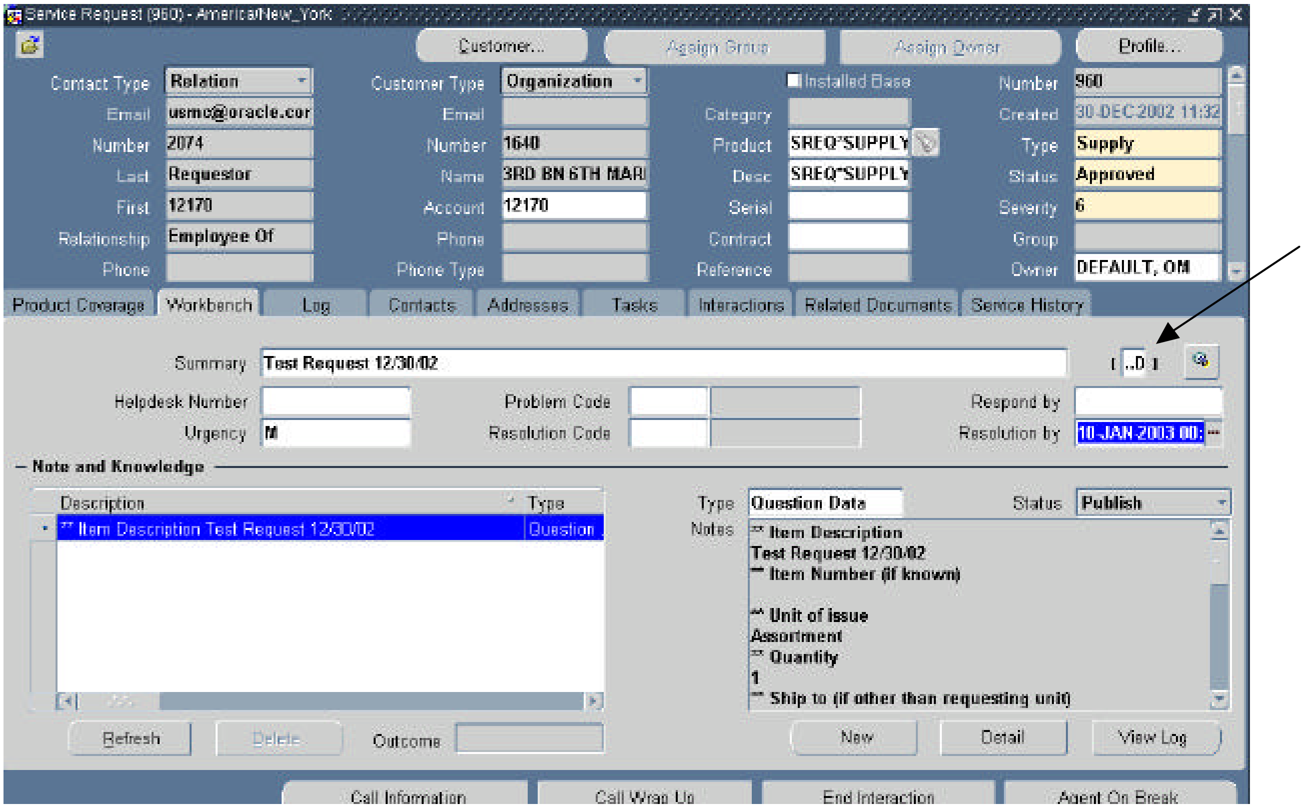
The SR owner field on the SR is always labeled as “Default, OM”. This is a system-generated value that must remain the same. Should a user try to populate a different value for this field, the user will receive an error message. An example of this error message is shown.



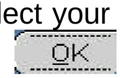
1. Owner – The owner field was changed from Default, OM to Harrison, Mr. Craig.
2. Save – The user attempted to save the record.
3. Error – This error appears because this is not the correct place to change the owner of the SR.

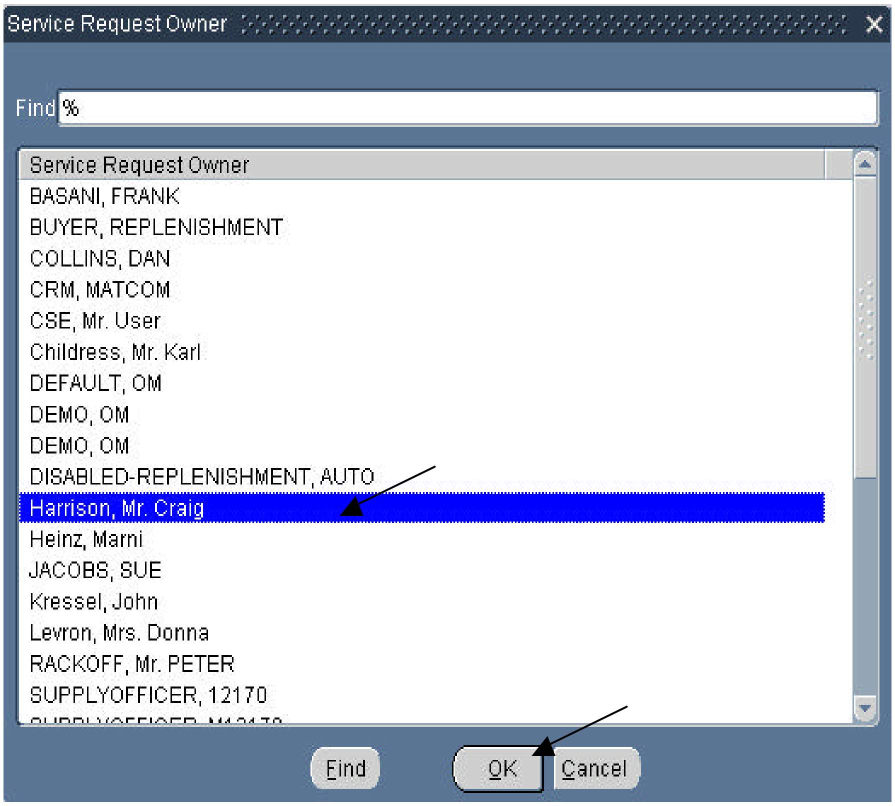
3.4.2 Correct Procedure for Changing the Owner of a SR

SR Owner – The SR Owner field as configured for the business flow of the system can be accessed by clicking on the SR header flexfield  located on the workbench tab.

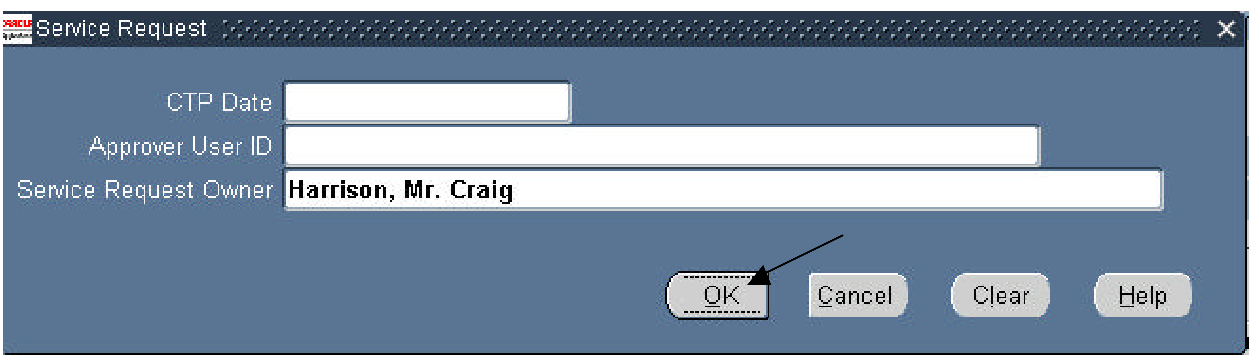


The following pop-up form will appear:

Click on the LOV  icon in the Service Request Owner field to select your name in the list of values window. Once you have selected your name click on the  button to exit the search window.



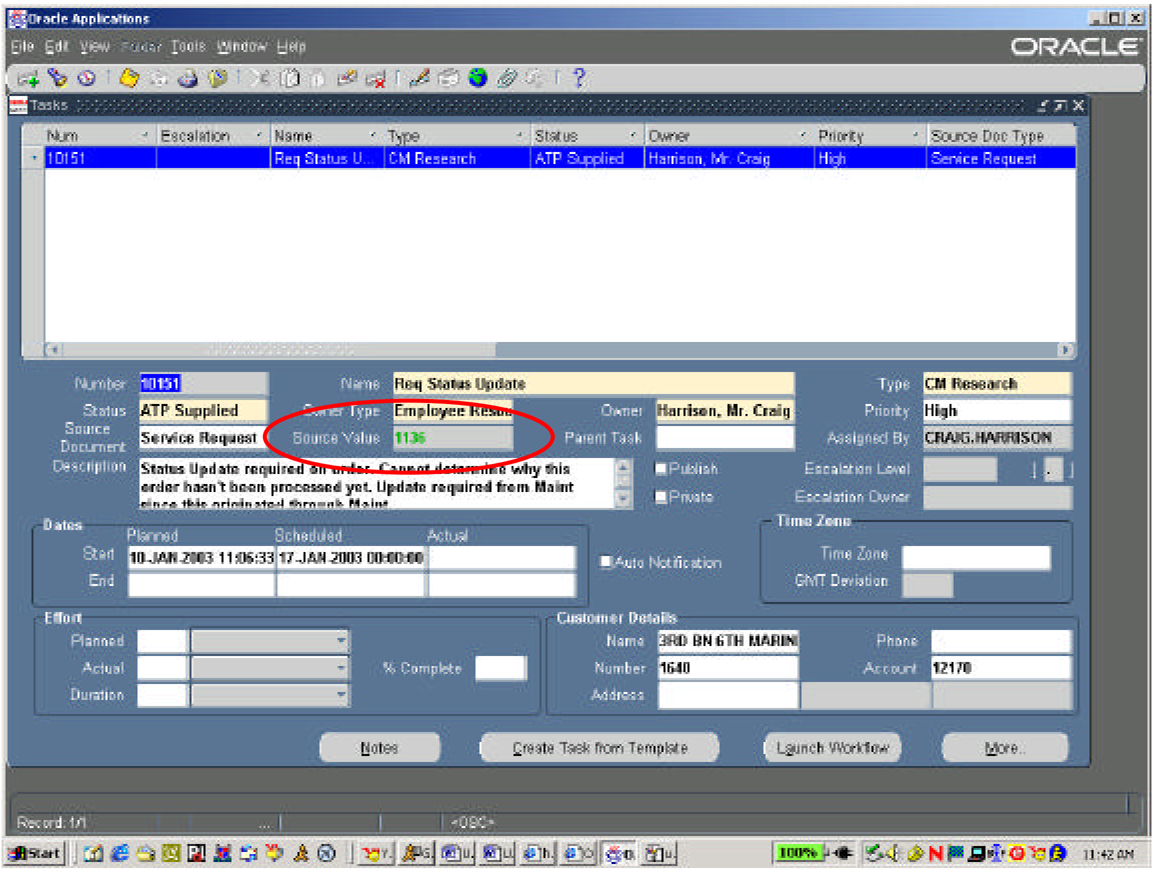
Click on the  button in the Service Request flexfield after you have selected your name from the LOV window.

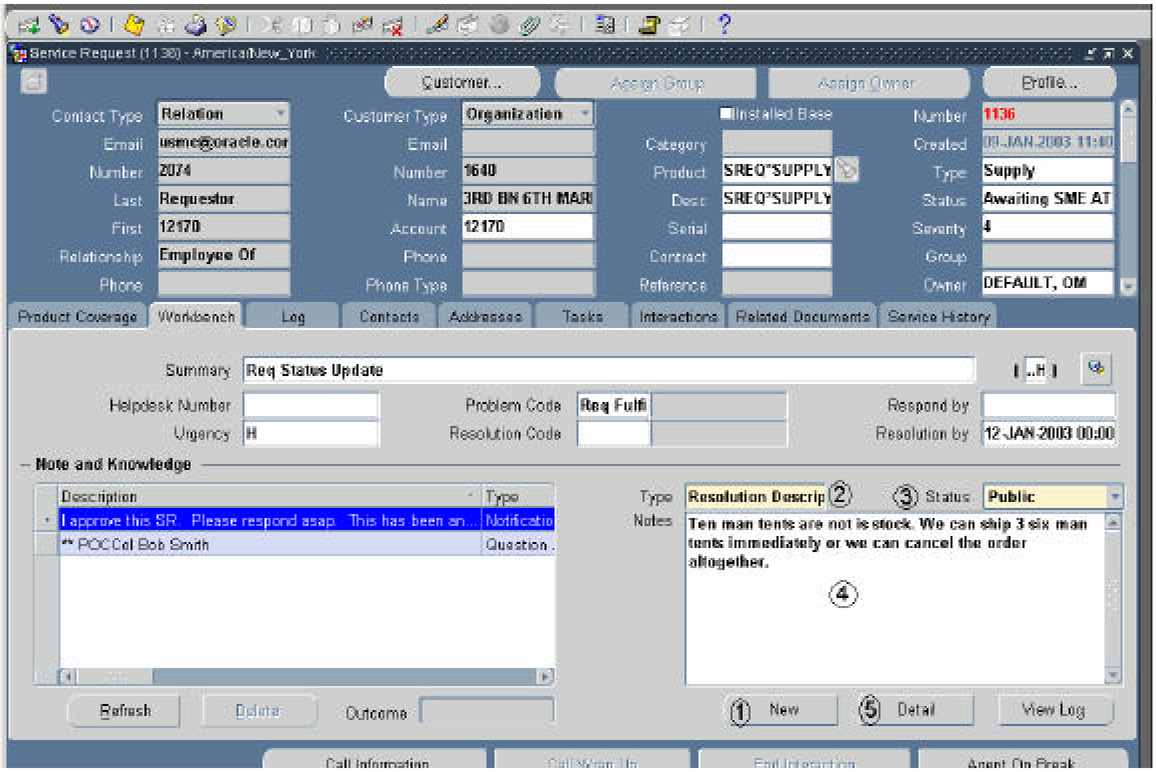


After exiting the flexfield, click on the  Button in the menu area to save your work.

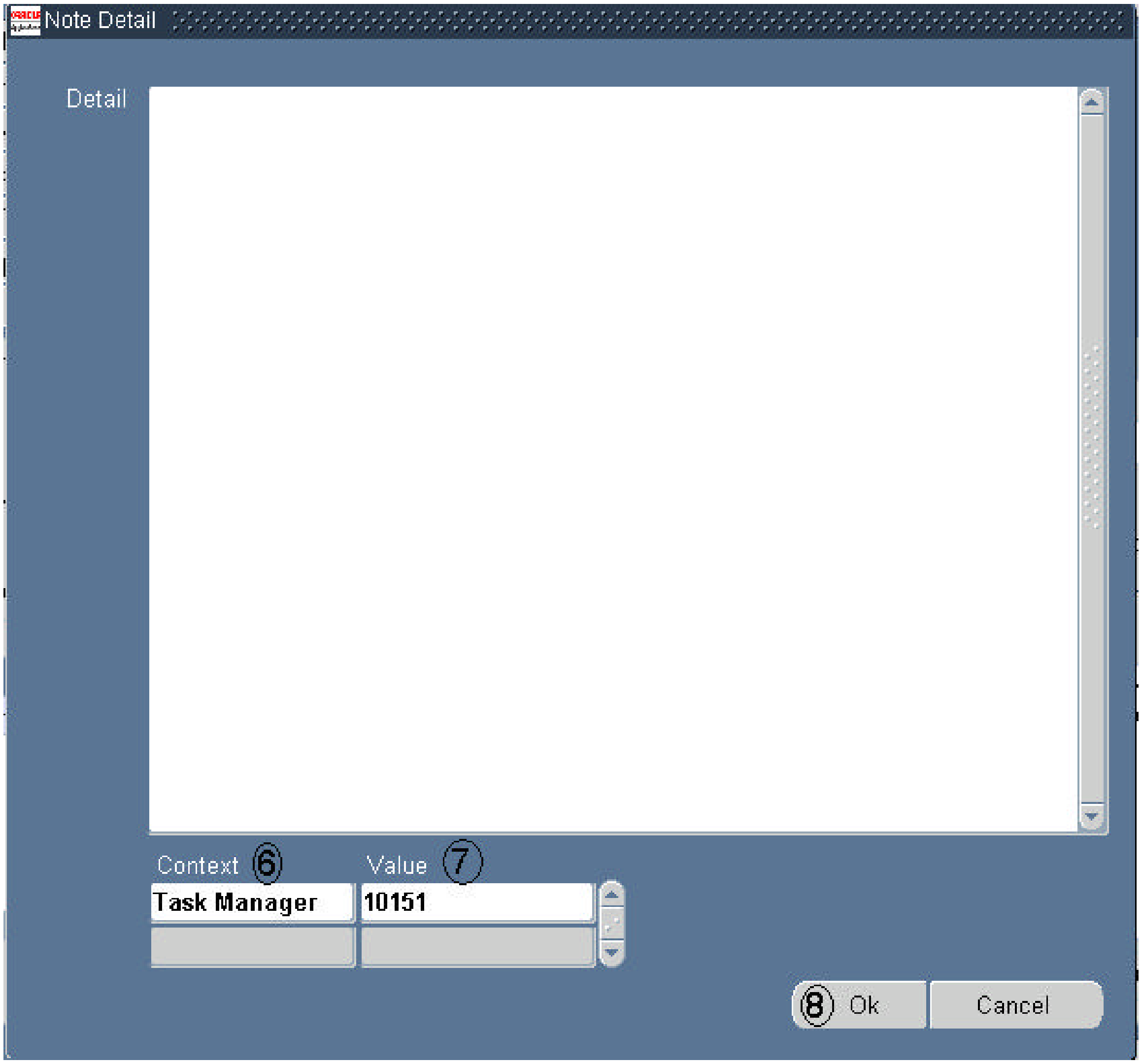
3.5 ADDING NOTES TO AN SR FROM A TASK SCREEN

Should a user wish to add a note to an SR from a task screen, they may do so by clicking on the Source Value, which is in green and is a hyperlink i.e. the number of the SR that the task is attached to and then add a note to the SR.





1. New – Button used to generate new notes.
2. Type – Type of note to be generated.
3. Status – In this case the status is Public. A status of public will only make the note available to be viewed by customer service representatives and the requestor will not be able to see the note. Alternatively, Publish could be selected instead of Public and all customer service representatives and the Requestor would then be able to see the note.
4. Notes – The actual text of the note.
5. Detail – The detail button is used to link the note to the task that it is associated with.



6. Context – Task Manger is selected to link the note to a task.
7. Value – The value of the task that the note is linked to is inserted.
8. Ok – Ok button is pushed to record the updates and make the link.

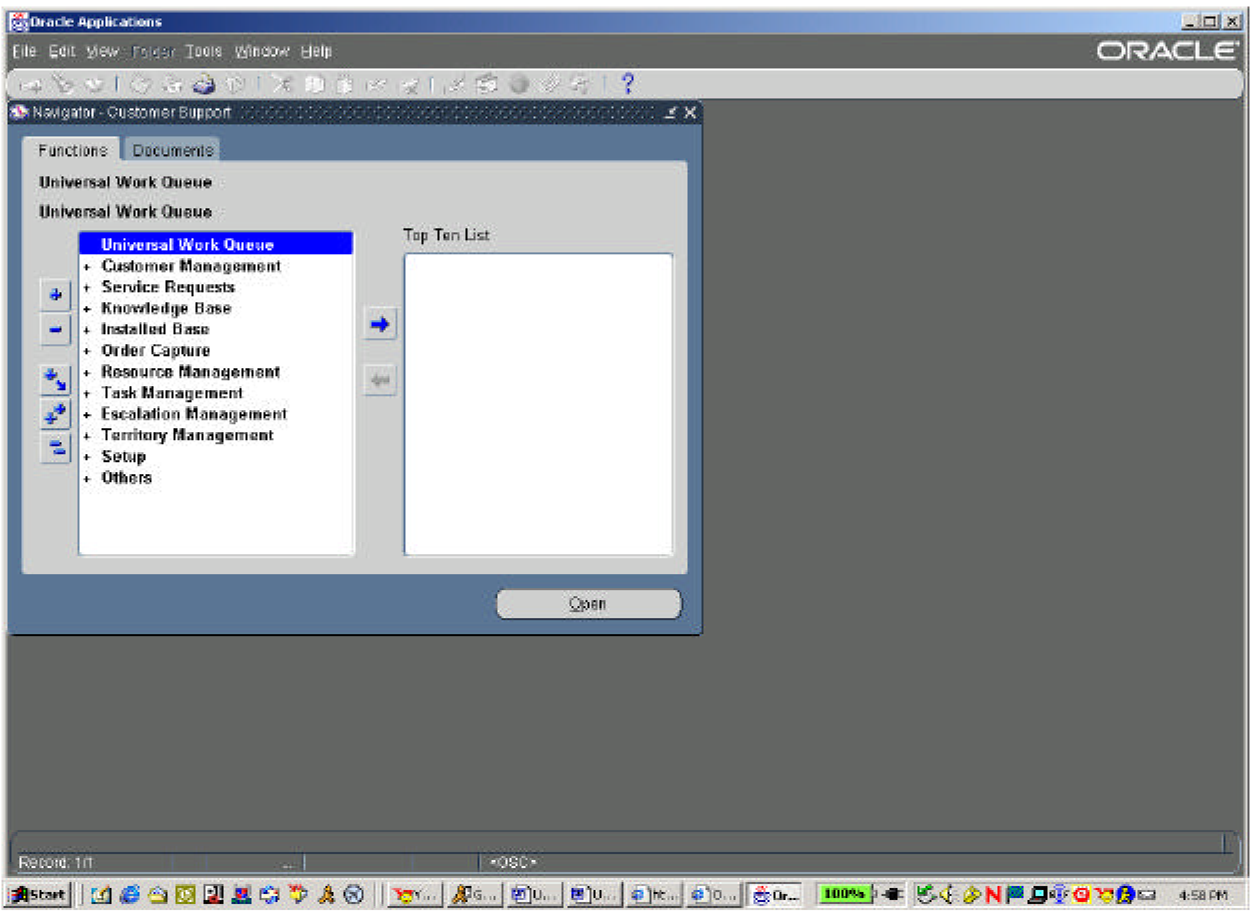
4.0 Customer Service Inquiry Business Process (Oracle TeleService)

The purpose of this section is to demonstrate how the software enables the business process set forth by the OA. The intent of this section is to step through the different scenarios using screen shots of the Oracle software, outlined in the business process model in Section 2.0 of the MATCOM Call Center Systems Design Document. This section of the document begins with the receipt of an inquiry by the Local Customer Service Executor (CSE).

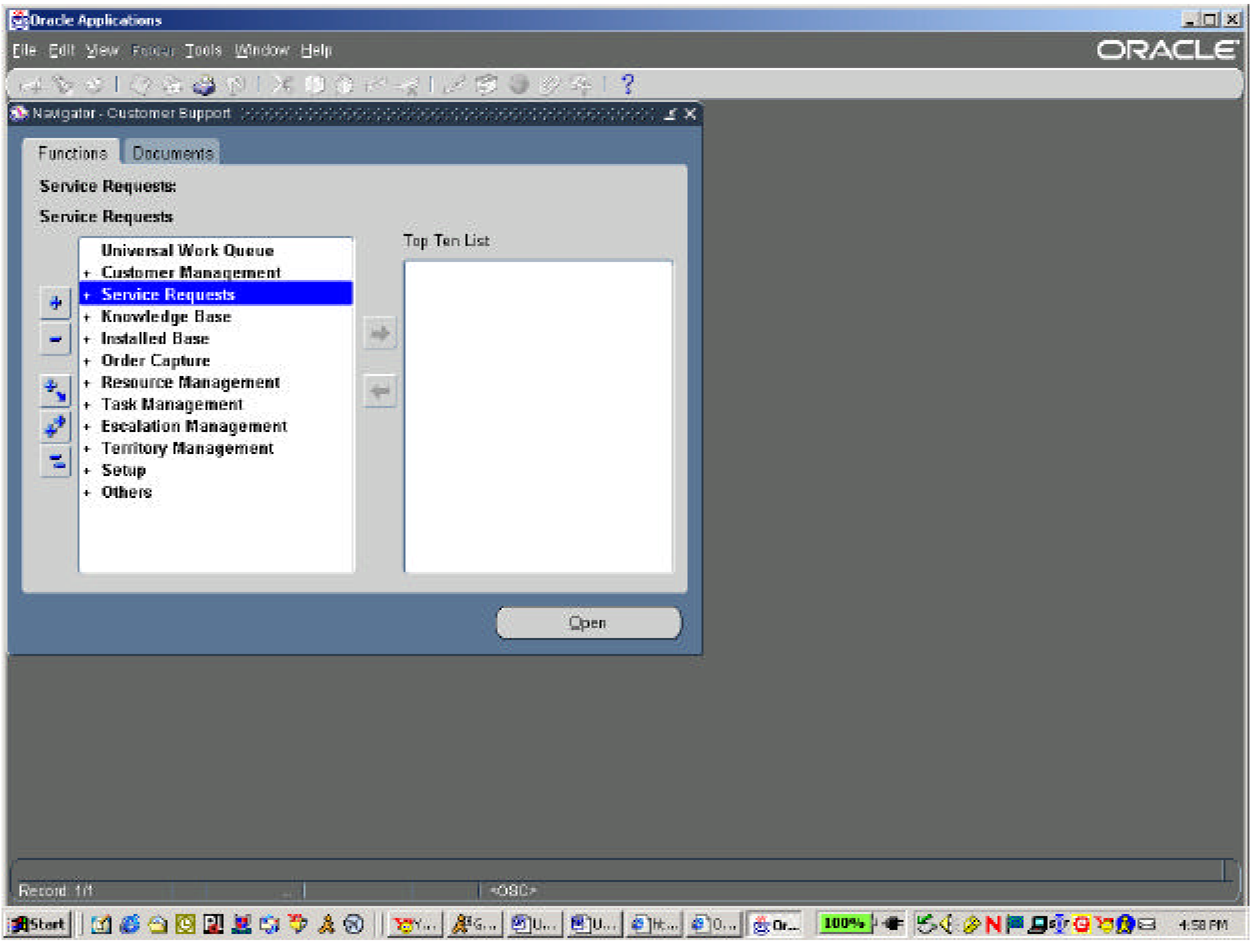
4.1 Viewing/Finding Service Requests using the Customer Support Responsibility

Within the Customer Support responsibility there are different ways to find and view service requests. For the purposes of the MATCOM call center, the implementation team's recommended approach to finding service requests is as follows:

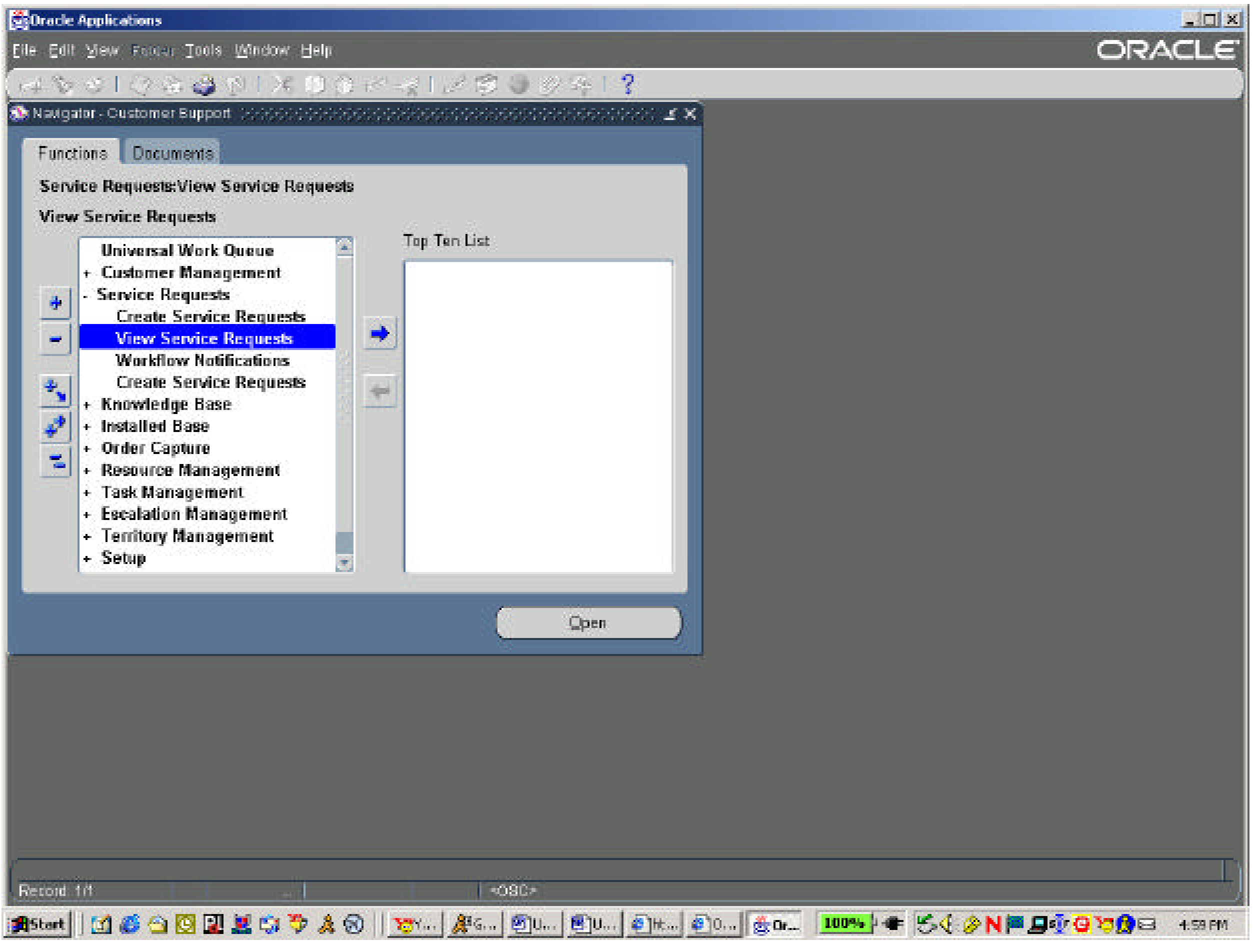
1. Navigate to the "Navigator - Customer Support " screen by following the steps outlined in sections 2.1-2.2 of this document.



2. Double click “Service Requests”

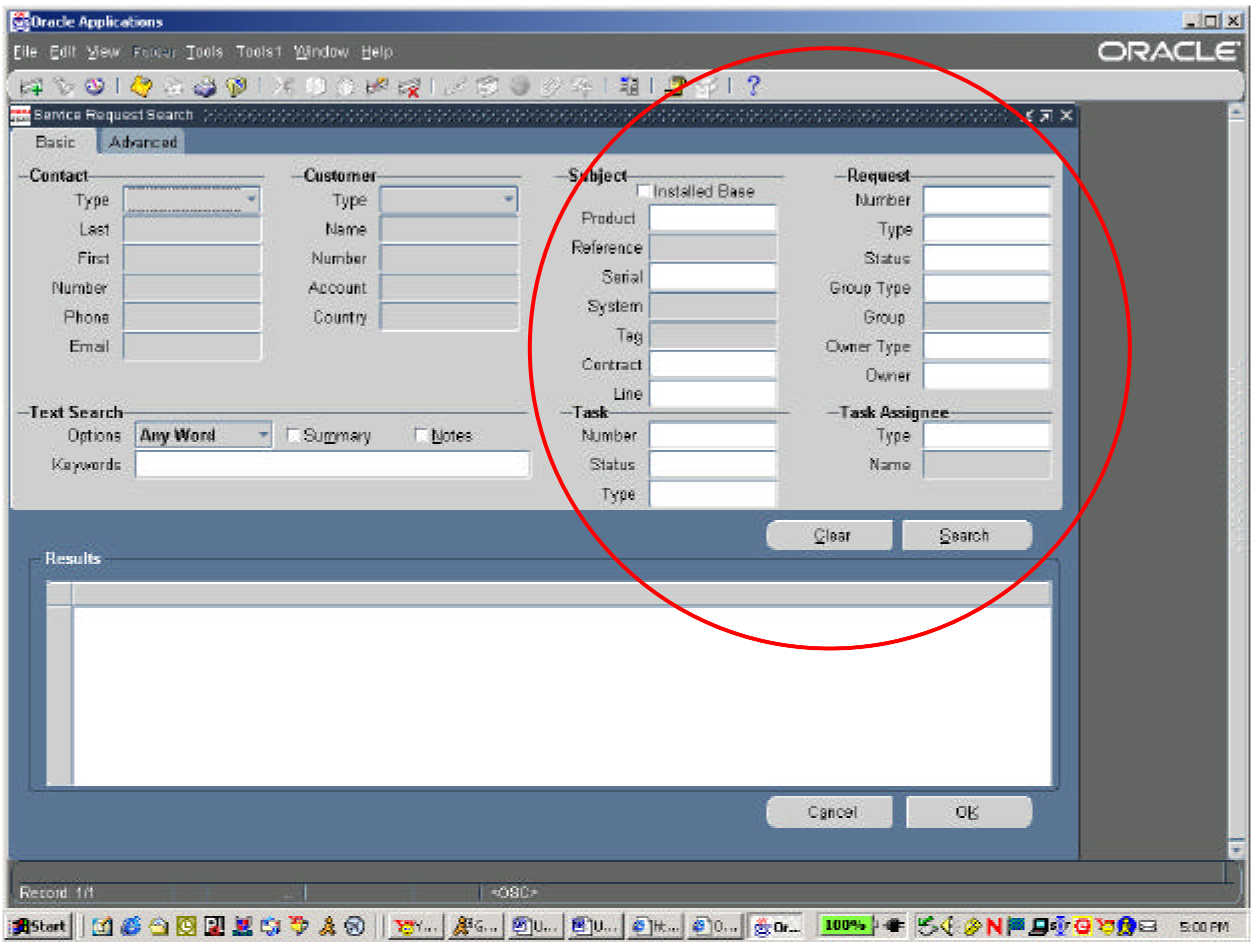


3. Double click “View Service Requests” and wait for the window to open.



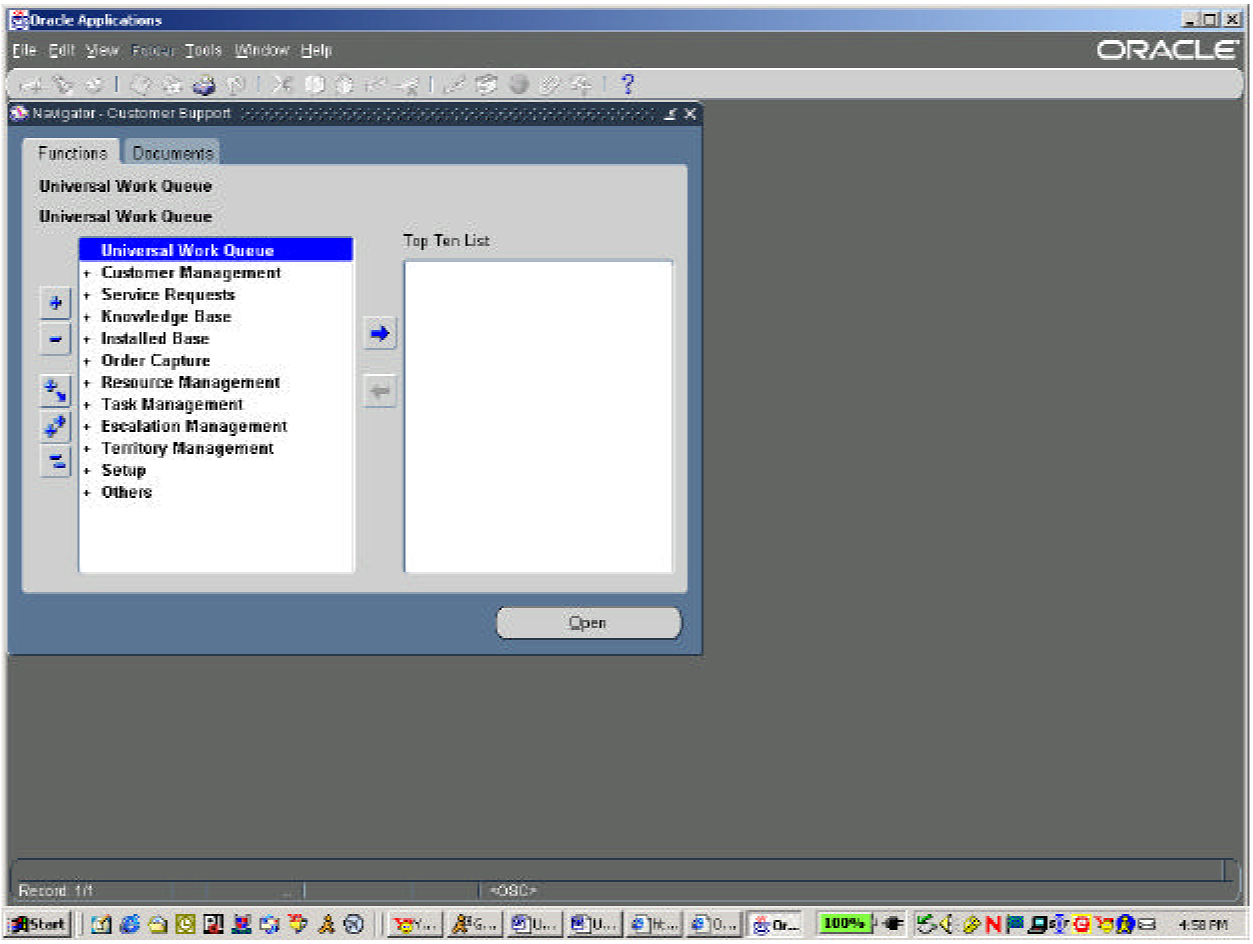
4. Enter all relevant search criteria (i.e. type, status) using the List of Values (LOV ...) (See Section 2.4 for help with the List of Values (LOV ...)

5. Press the Search button

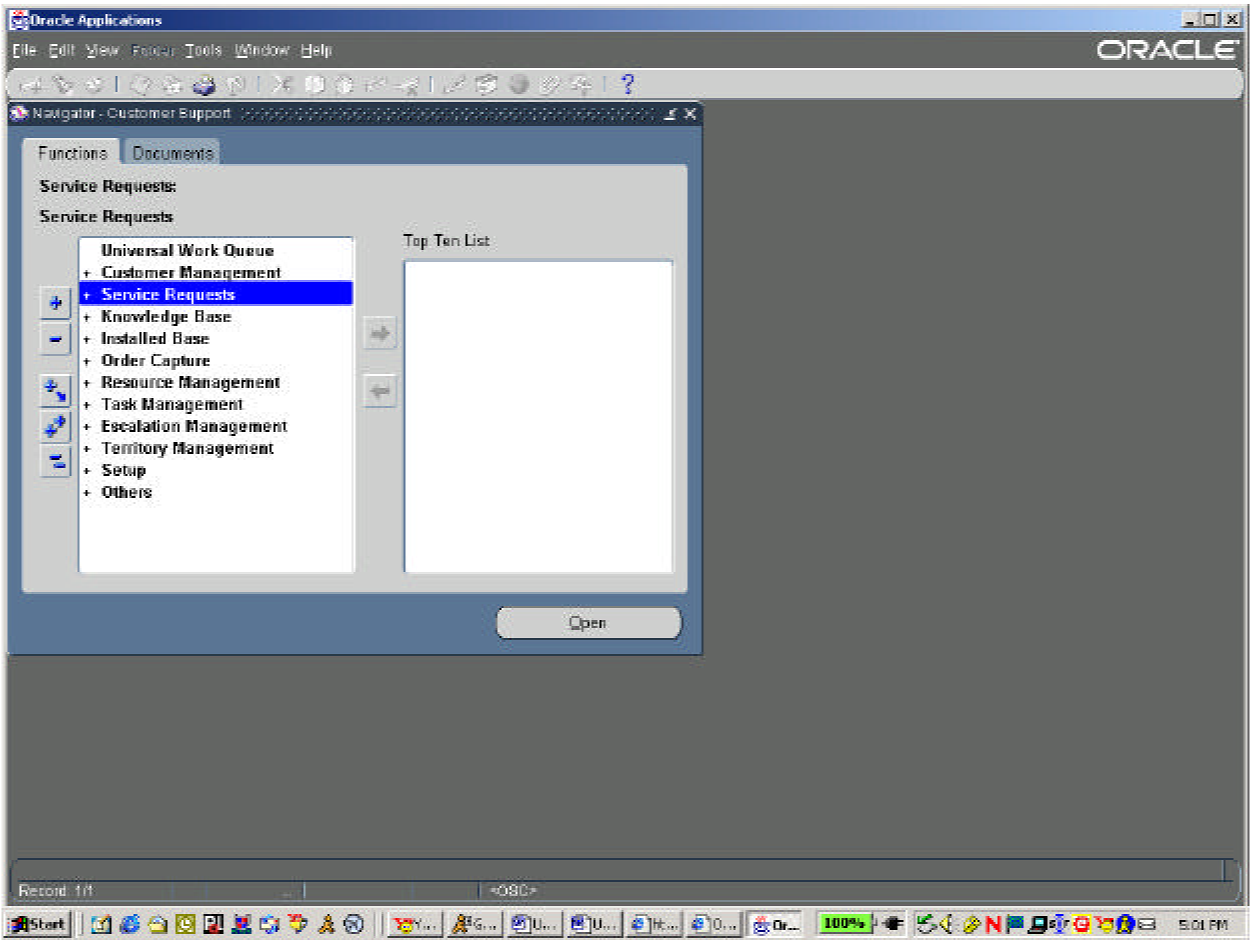


Alternatively, if the Service Request number is known by the user, the user may follow these steps:

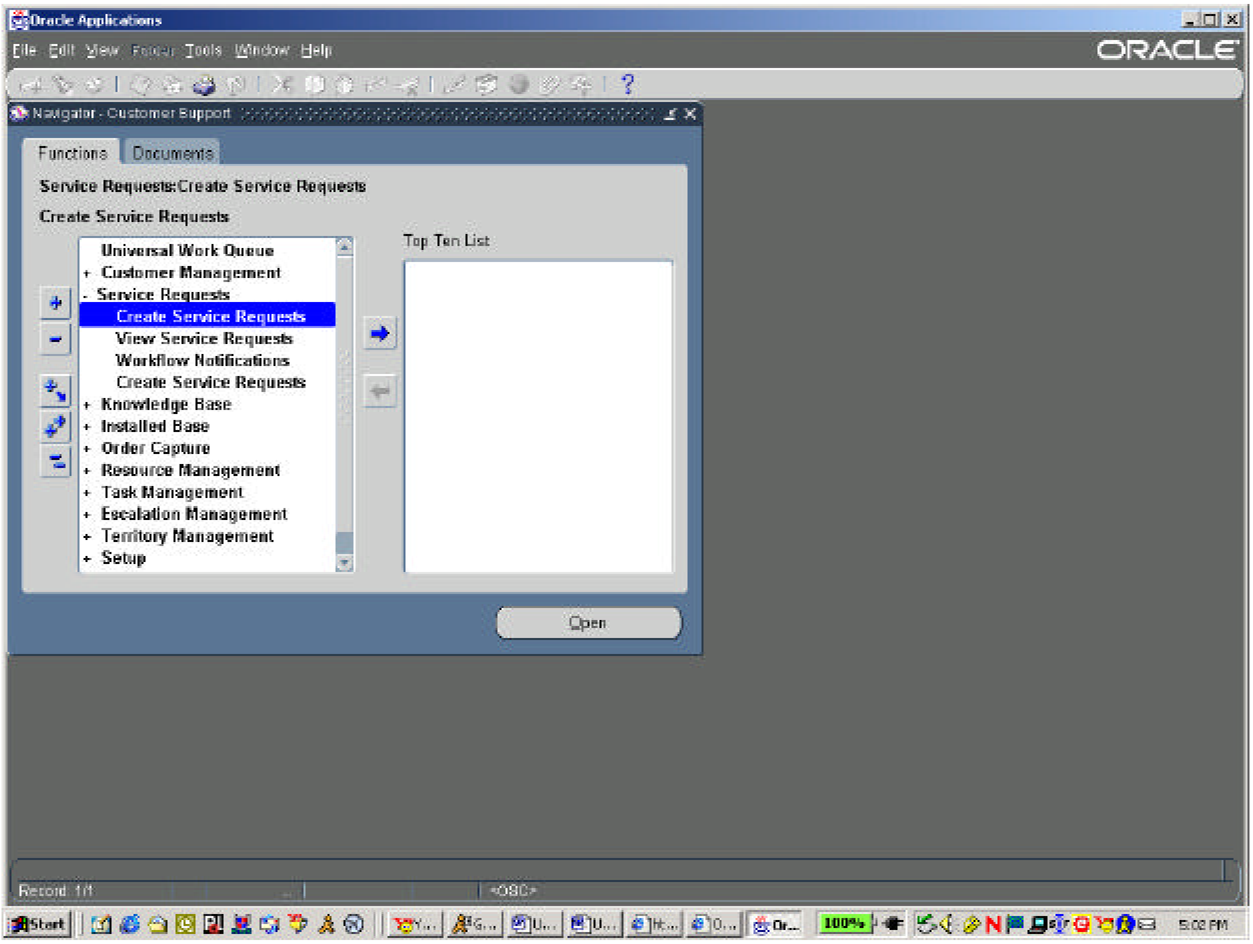
1. Navigate to the "Customer Support – Navigator" screen by following the steps outlined in sections 2.2-2.4 of this document.



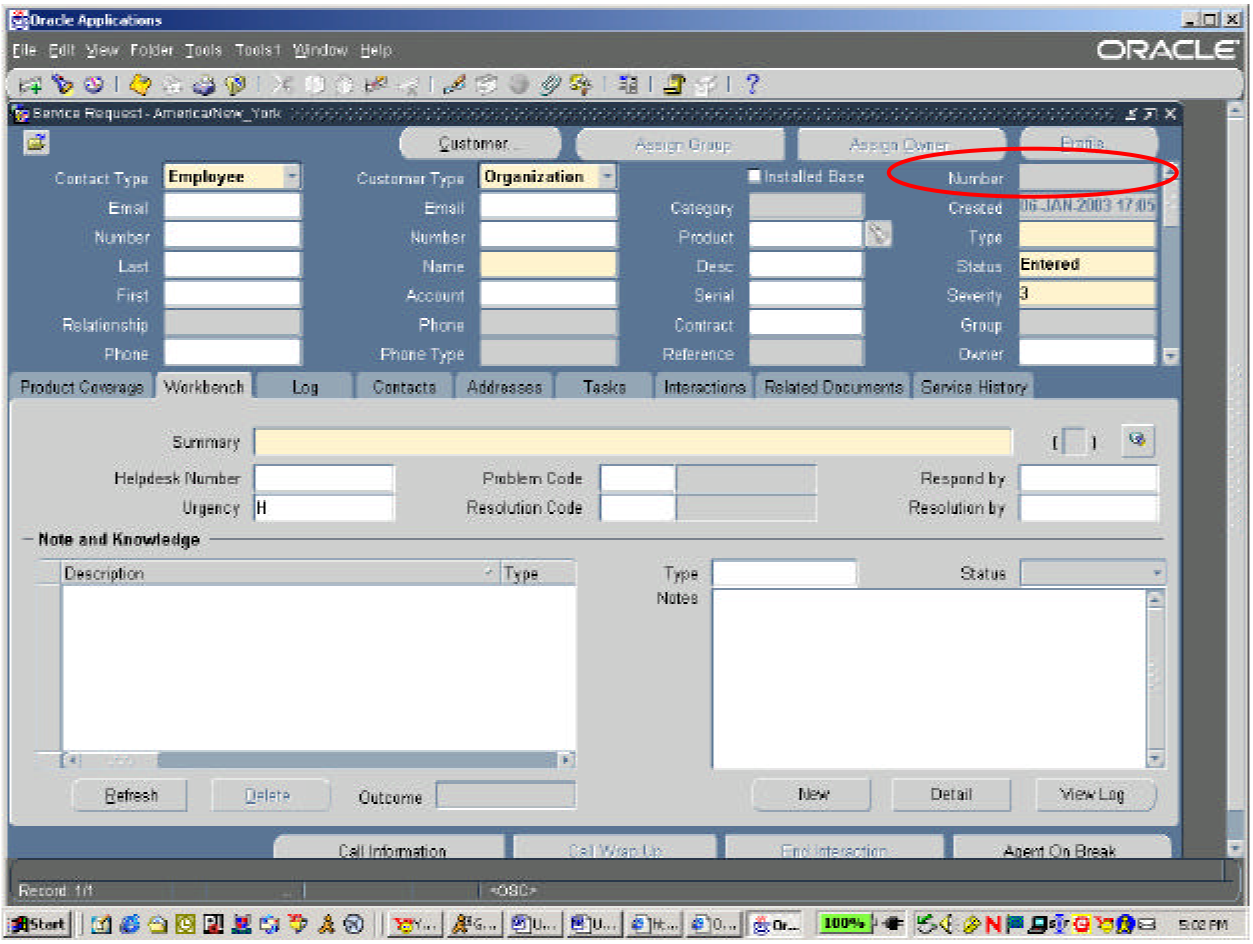
2. Double click "Service Requests"



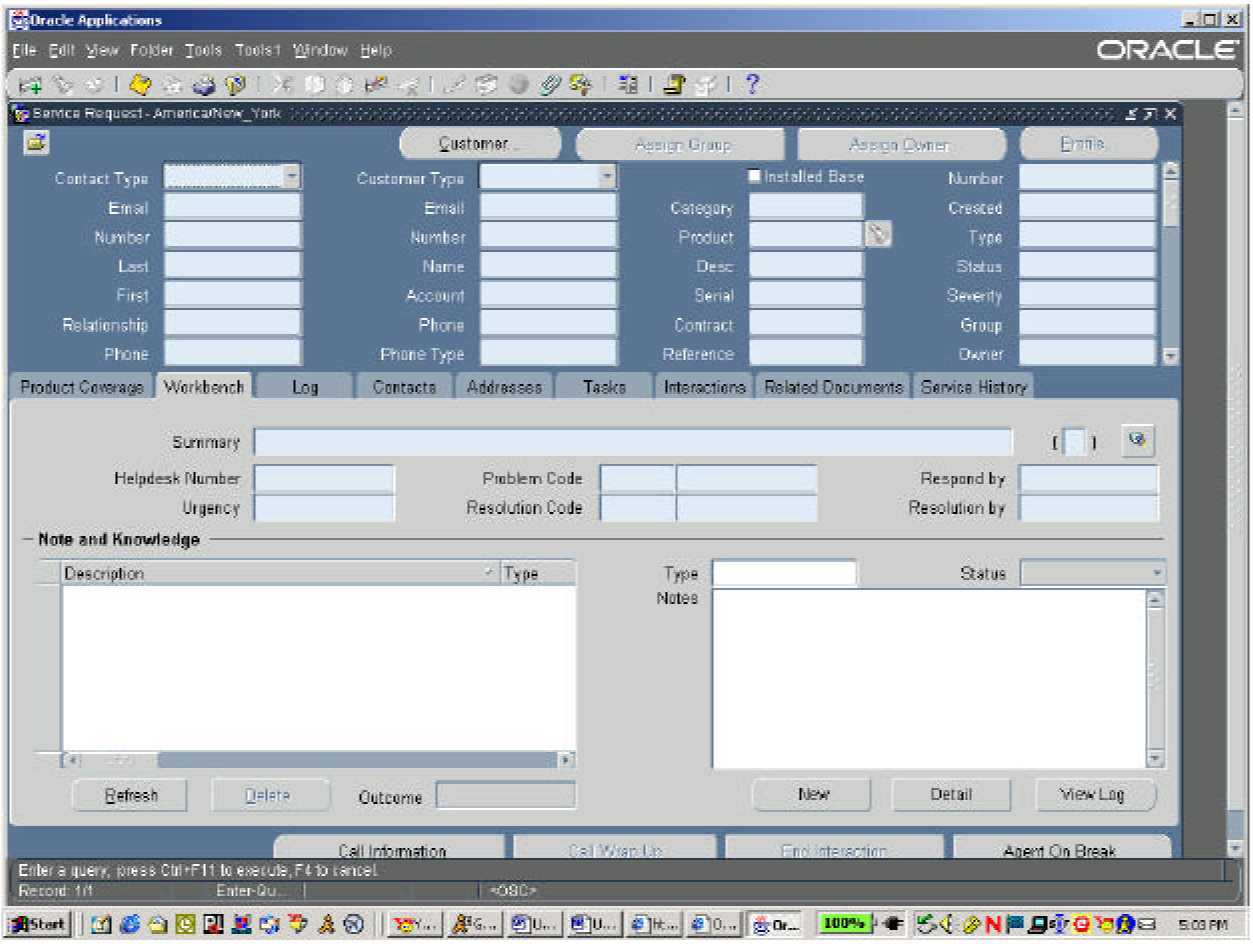
3. Double click "Create Service Requests" and wait for the window to open



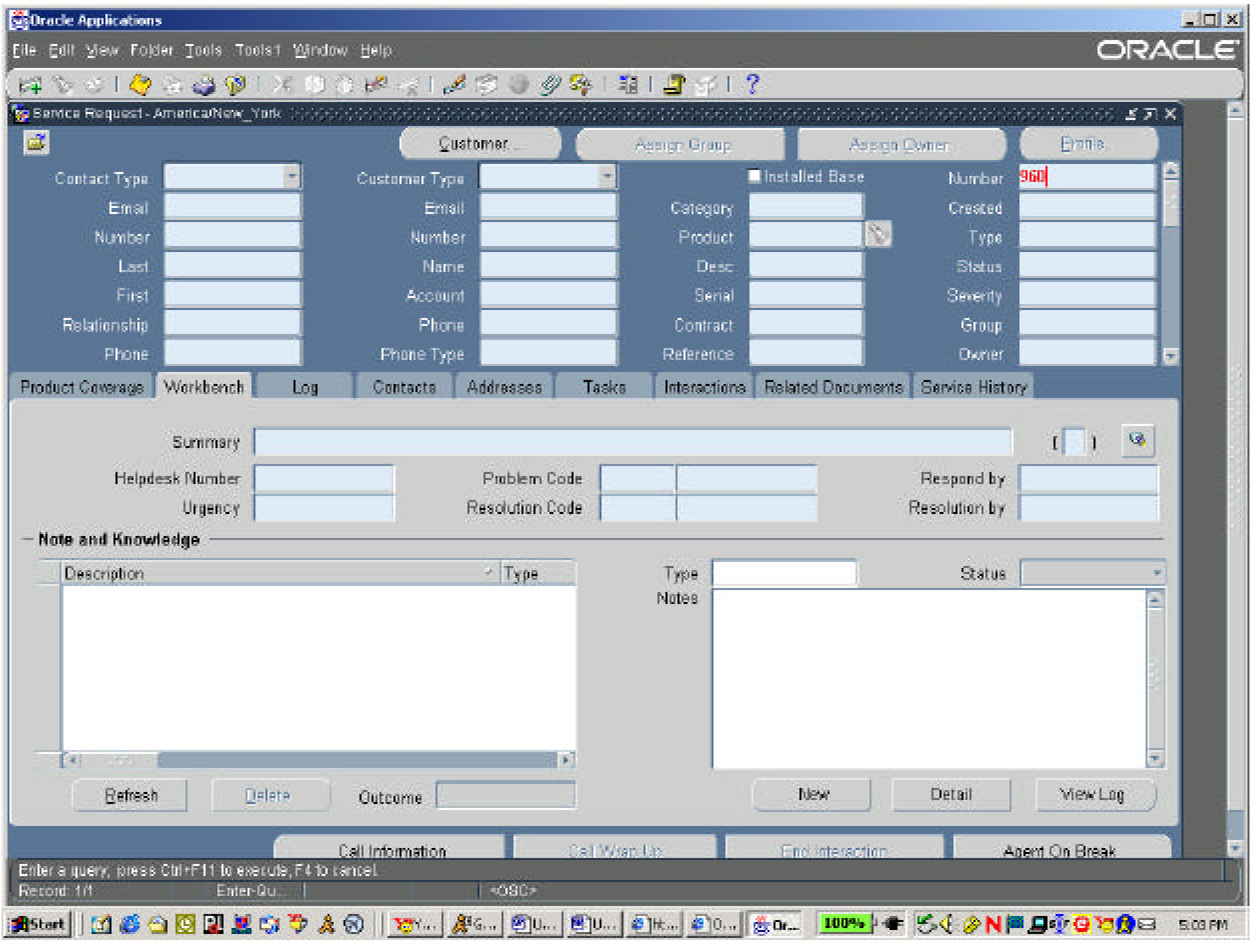
4. Click in the “number” box at the top right of the screen.



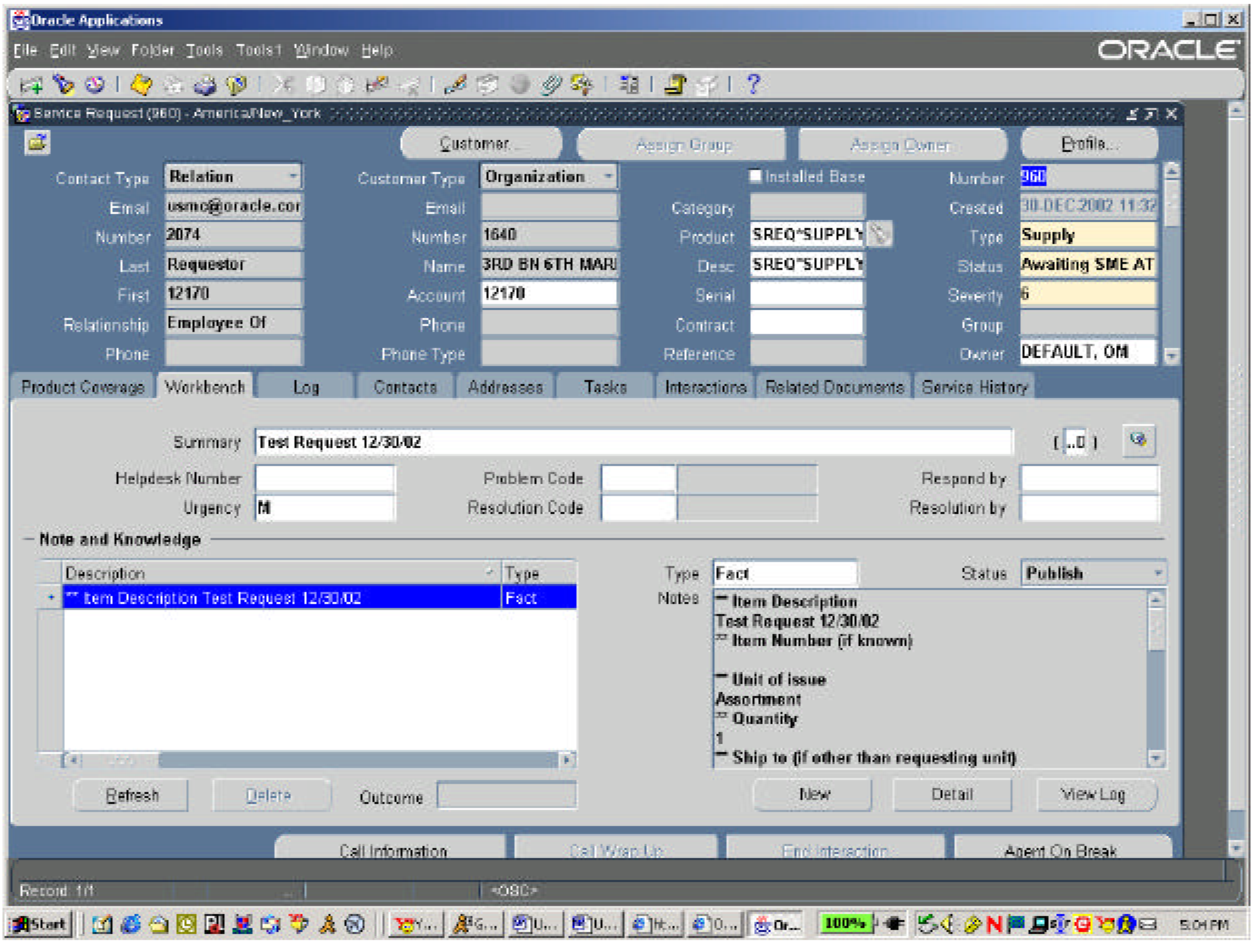
5. Press F11 to enter Oracle's query mode and the boxes on the screen will turn blue (See Section 2.6 for a description of Oracle's query mode)



6. Enter the Service Request you wish to find



7. Press Ctrl + F11 at the same time to run the query (Results Displayed Below)

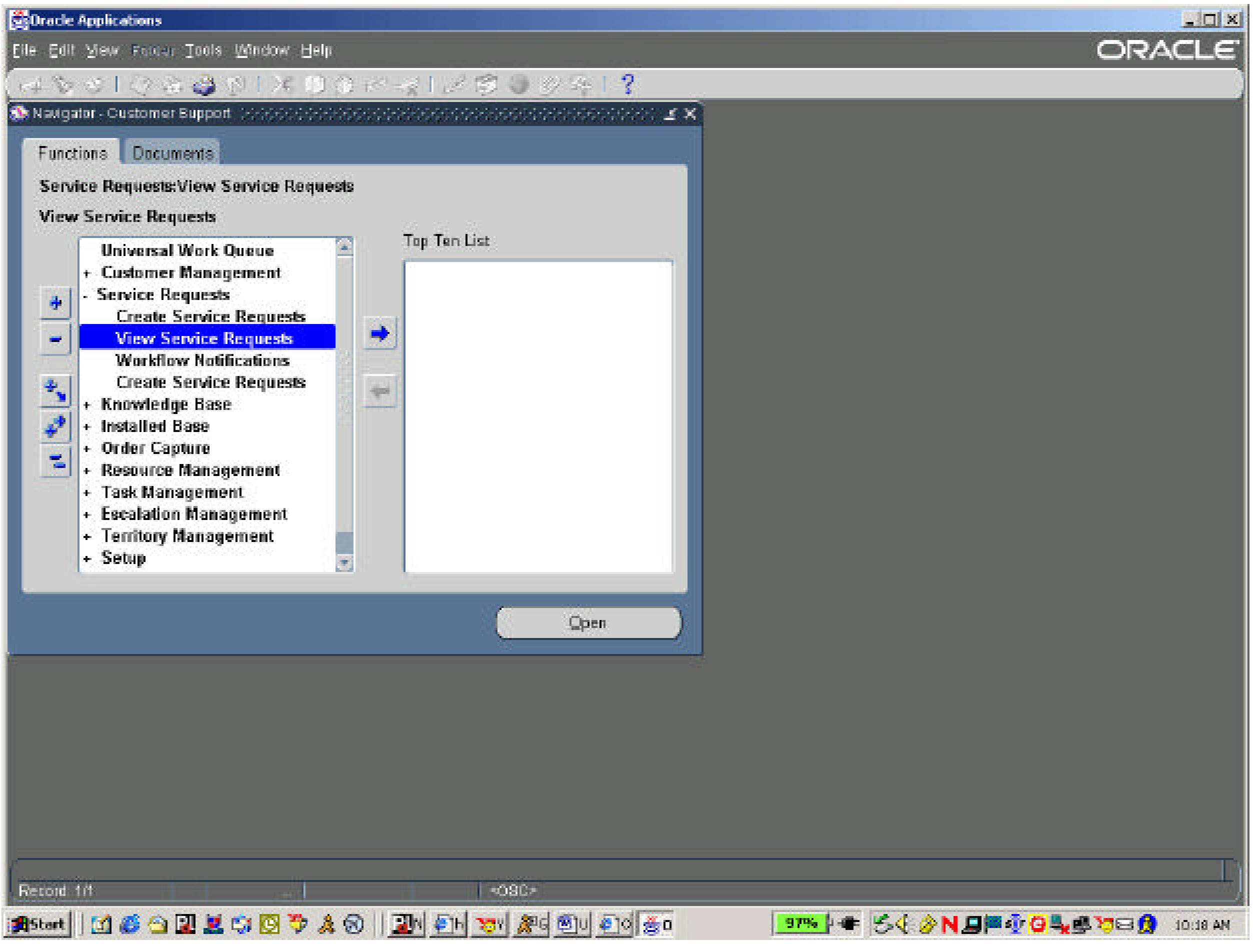


4.2 RECEIPT OF A REQUEST BY THE LOCAL CUSTOMER SERVICE EXECUTOR (CSE)

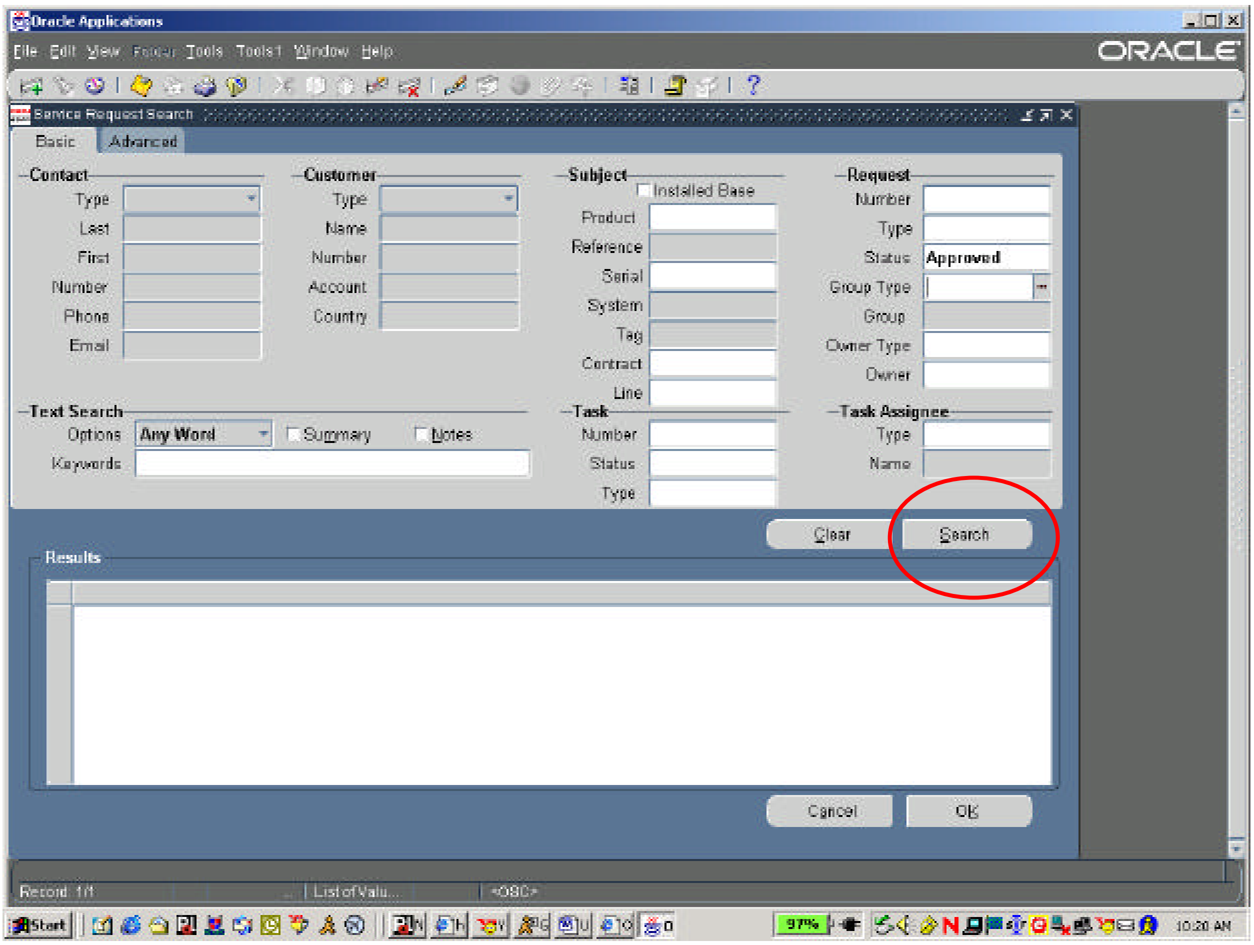
Attention: This section of the document assumes that the user is a CSE

A local CSE will determine that a service request has been assigned to his/her unit and approved by the Supply Officer/S4 by querying for SRs with a status of "Approved" in the Customer Support Responsibility. The steps to determine which SRs need to be worked are as follows:

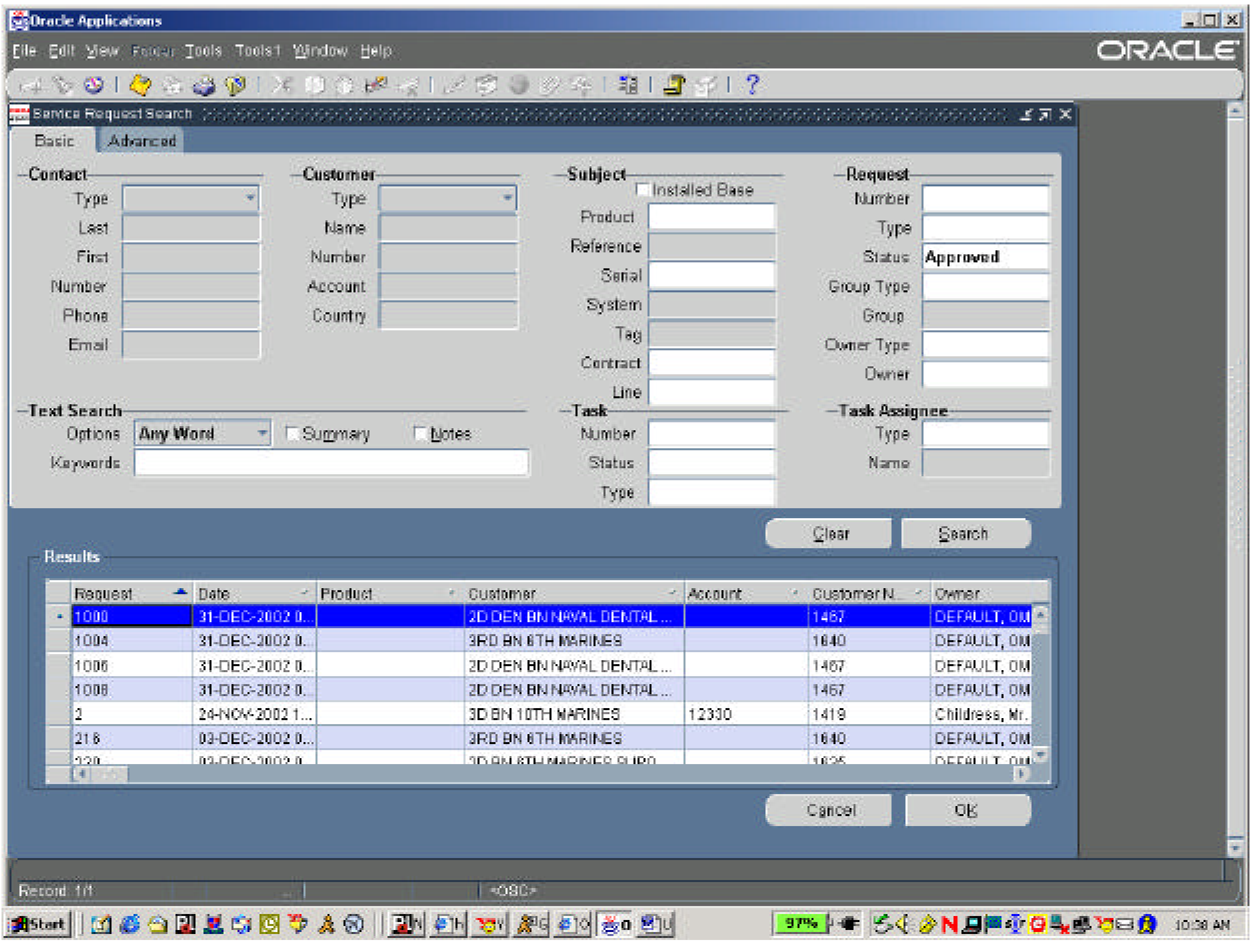
1. Login to the Portal
2. Follow instructions to access Oracle Apps responsibility
3. Login to Oracle (Section 2.2)
4. Select the "Customer Support" responsibility (Section 2.3)
5. From the Customer Support-Navigator screen, open "View Service Requests"


Oracle Applications
File Edit View Folder Tools Window Help
ORACLE
Navigator - Customer Support
Functions
Documents
Service Requests:View Service Requests
View Service Requests
Universal Work Queue
Customer Management
Service Requests
Create Service Requests
View Service Requests
Workflow Notifications
Create Service Requests
Knowledge Base
Installed Base
Order Capture
Resource Management
Task Management
Escalation Management
Territory Management
Setup
Top Ten List
Open
Record: 1/1
<OSC>
Start
97%
10:18 AM

6. Select a status of “Approved” from the Status field LOV 
7. *Optional*: Select other SR attributes to help narrow the search
8. Press the  button that is circled to conduct the search for SRs with a status of “Approved”



After pressing the Search button, a list of SRs will appear in the Results window as shown below.



Again, to narrow the search, the CSE can pick SR attributes to search for in addition to the status field. The CSE then selects the SR that he/she would like to work by highlighting the SR and pressing the OK button at the bottom of the screen or simply by double-clicking on the desired SR record in the table.

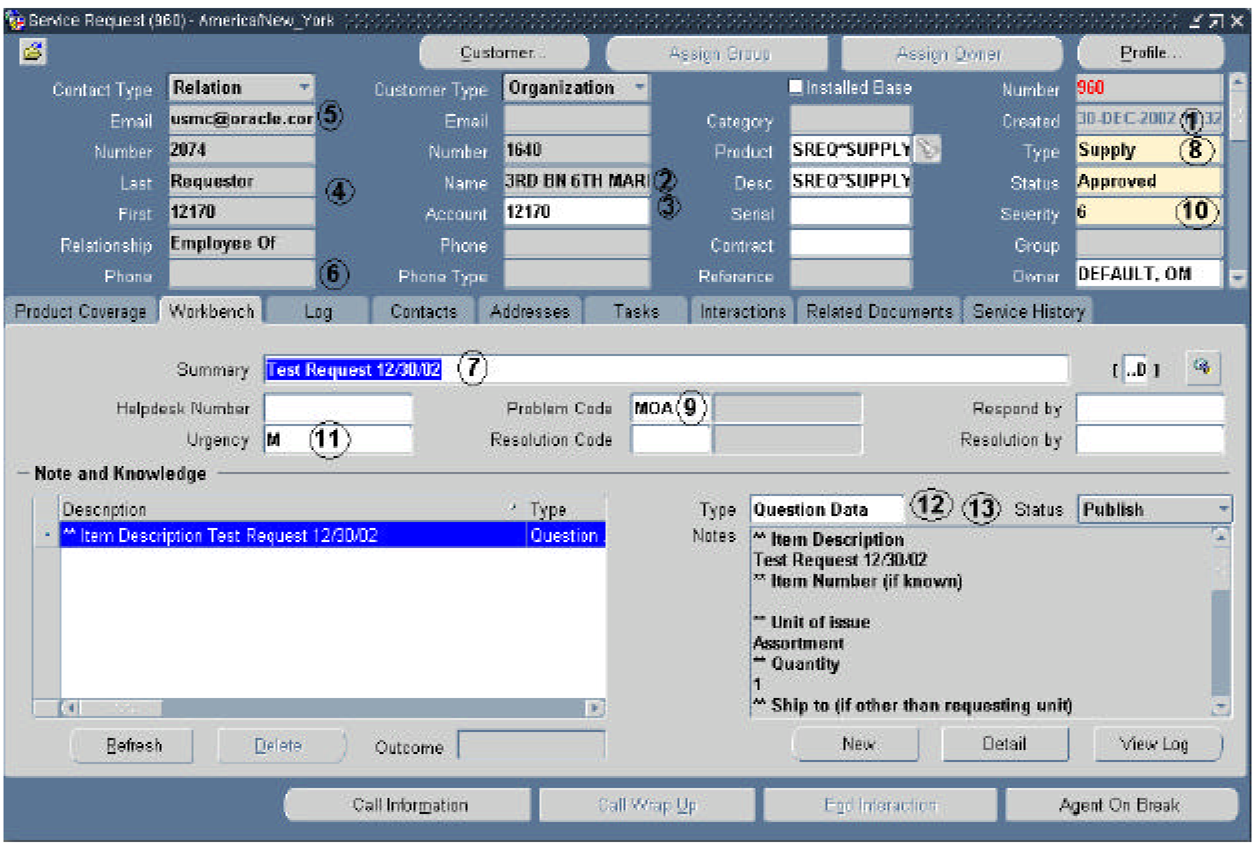
4.3 INITIAL ASSESSMENT OF SR

Attention: This section of the document assumes that the user is a CSE

After locating and reviewing an "Approved" SR, the CSE must determine whether he/she can fulfill the request, if additional information is needed from the requestor, if the SR is invalid and should be cancelled, or if additional assistance is needed to fulfill the request.

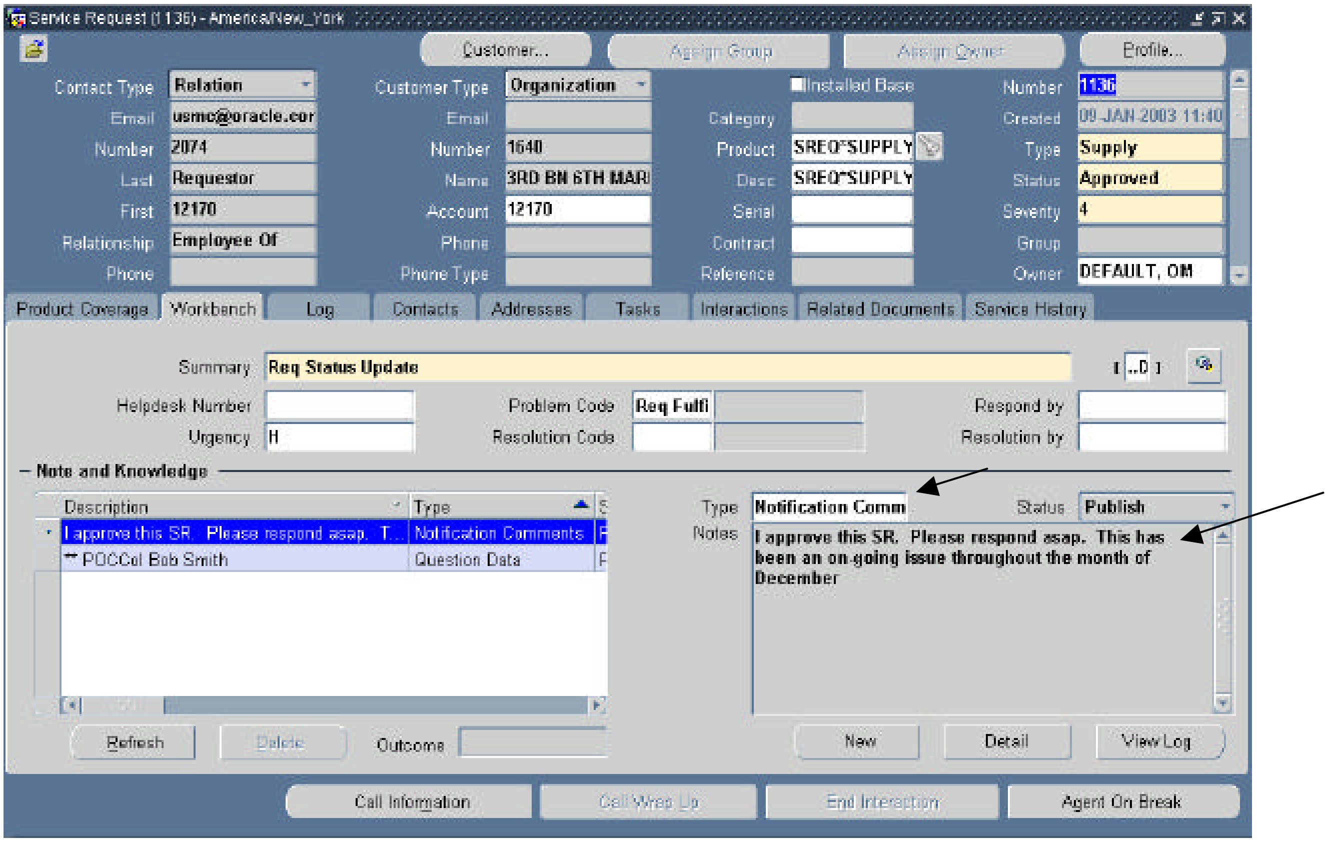
SR Assessment

The CSE will first assess the nature of the Service Request by reviewing some key fields entered by the requestor through iSupport:



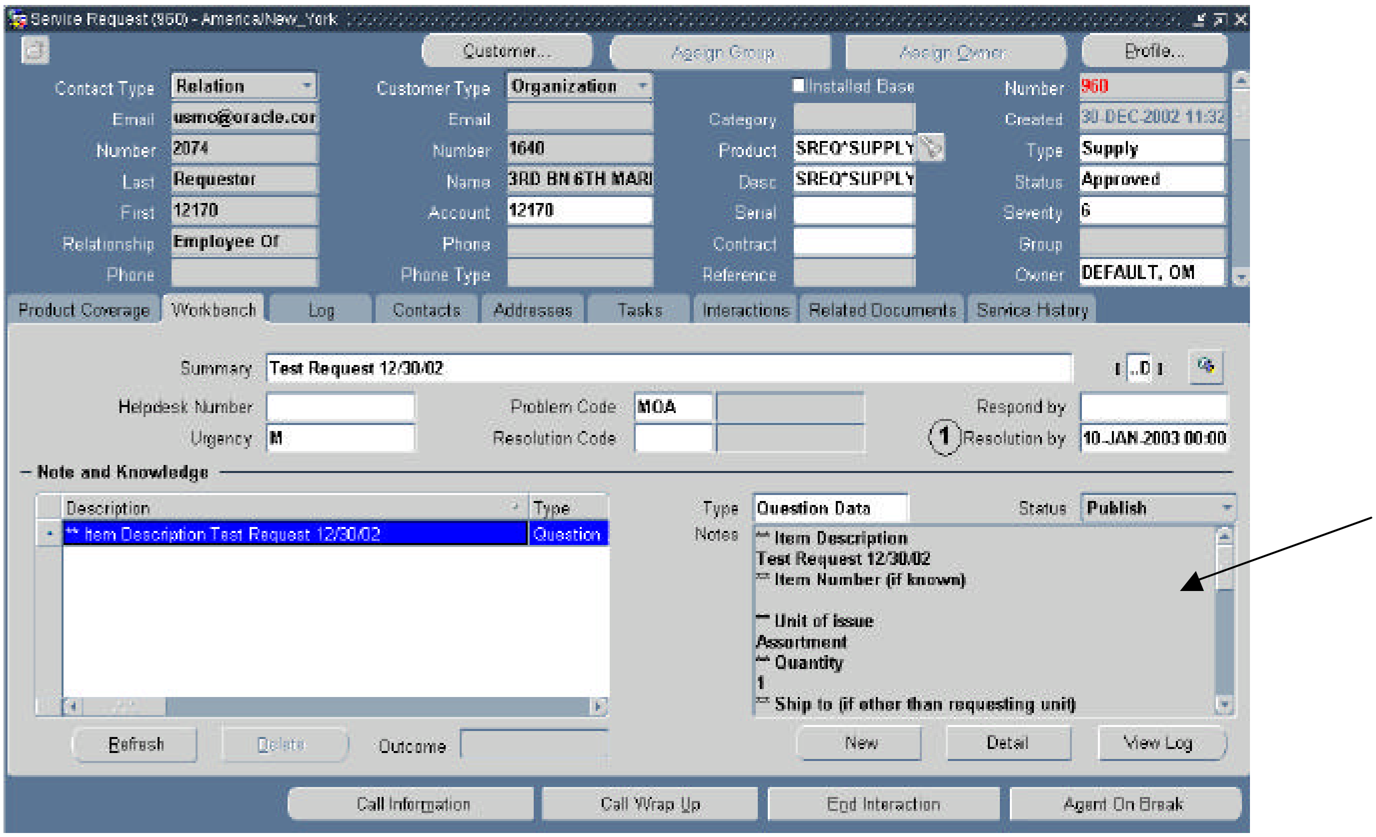
1. Created – Date SR was submitted by requestor through iSupport
2. Name (Customer) – Name of requesting Using Unit
3. Account (Customer) – UIC/AAC of requesting Using Unit
4. Last, First (Contact Name) – Name of requestor associated to Using Unit who submitted SR through iSupport or name of person whom the requestor submitted the request on behalf of.
5. Email (Contact) – Email address of requestor or person whom requestor submitted SR on behalf of.
6. Phone (Contact) – Phone number of requestor or person whom requestor submitted SR on behalf of.
7. Summary – name given to the SR as defined by the requestor.
8. Type (SR) – generally defines the nature of the SR (i.e. Supply, Transportation, Maintenance, Engineering, Health Services, Free Form)
9. Problem Code – further defines the SR type (i.e. MOA, Req Fulfillment Update, Offline, IROAN, Supply Discrepancy, WIR Excess Parts, WIR Broken Parts, etc.)
10. Severity – Urgency of Need. A system generated calculation based on urgency and UIC's FAD.
11. Urgency – High, Medium, or Low as approved by requestor's supply officer
12. The Notes area where Note Type = 'Question Data.' Requestors are prompted with a series of questions during SR creation in iSupport based on the type of inquiry they are entering. The answers to these questions are provided in the form of a 'Question Data' note associated with the SR in TeleService.
13. Required Completion Date is provided in the Question Data note. Keep in mind that as a note field, the requested completion date *cannot* be queried or used for analysis purposes at a later date.

If the requestor's approver (Supply Officer or other) has entered additional comments, these can be viewed through the notes area as well. Notes entered by the approver during the SR approval process will appear as Note Type = 'Notification Comments.' See screen shot example below:

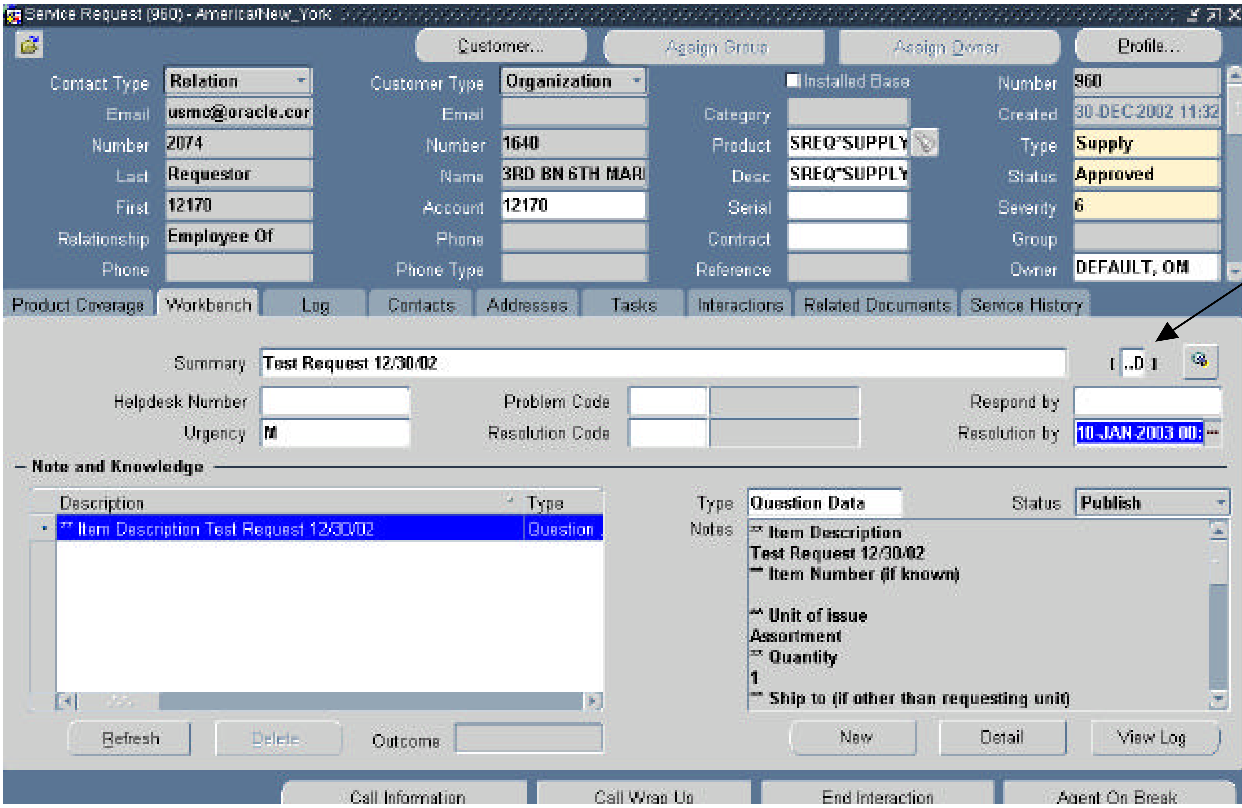

Service Request (1136) - America/New_York
Customer...
Assign Group
Assign Owner
Profile...
Contact Type Relation
Email usmc@oracle.cor
Number 2074
Last Requestor
First 12170
Relationship Employee Of
Phone
Customer Type Organization
Email
Number 1640
Name 3RD BN 6TH MAR
Account 12170
Phone
Phone Type
Installed Base
Category
Product SREQ*SUPPLY
Desc SREQ*SUPPLY
Serial
Contract
Reference
Number 1136
Created 09-JAN-2003 11:40
Type Supply
Status Approved
Severity 4
Group
Owner DEFAULT, OM
Product Coverage
Workbench
Log
Contacts
Addresses
Tasks
Interactions
Related Documents
Service History
Summary Req Status Update
Helpdesk Number
Urgency H
Problem Code Req Fulfi
Resolution Code
Respond by
Resolution by
Note and Knowledge
Description
Type
I approve this SR. Please respond asap. T...
Notification Comments
POCCol Bob Smith
Question Data
Type Notification Comm
Status Publish
Notes
I approve this SR. Please respond asap. This has been an on-going issue throughout the month of December
Refresh
Delete
Outcome
New
Detail
View Log
Call Information
Call Wrap Up
End Interaction
Agent On Break

The CSE will populate some preliminary fields to assist in future query and/or analysis purposes. These fields include:

1. Resolution by – the required completion date can be found in the ‘Question Data’ notes field. Re-enter the date provided by the requestor in the Resolution By field.

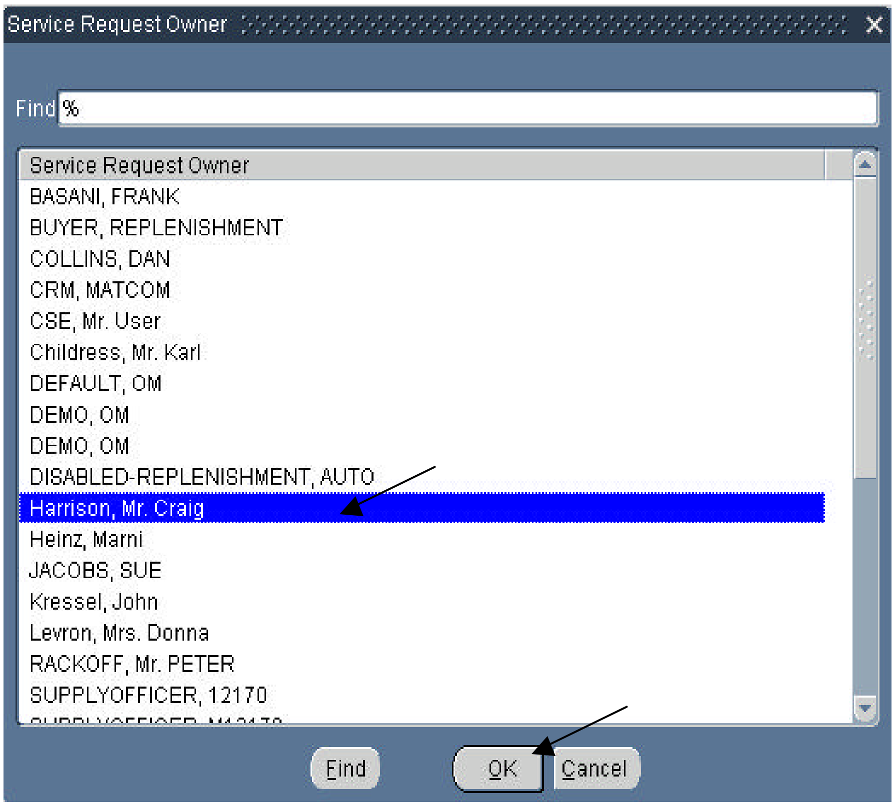


2. SR Owner – The SR Owner field as configured for this business flow can be accessed by clicking on the SR header flexfield [..D] located on the workbench tab.

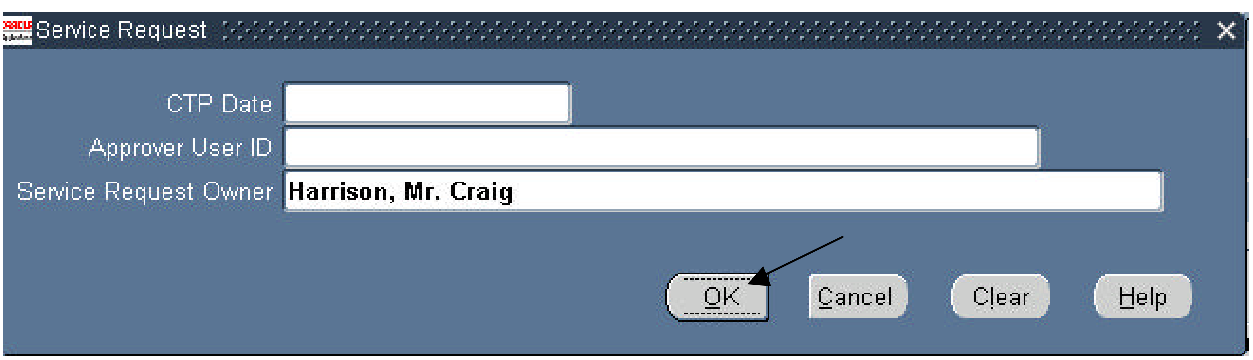


The following pop-up form will appear:

Click on the LOV icon in the Service Request Owner field to select your name in the list of values window. Once you have selected your name click on the OK button to exit the search window.



Click on the OK button in the Service Request flexfield after you have selected your name from the LOV window.

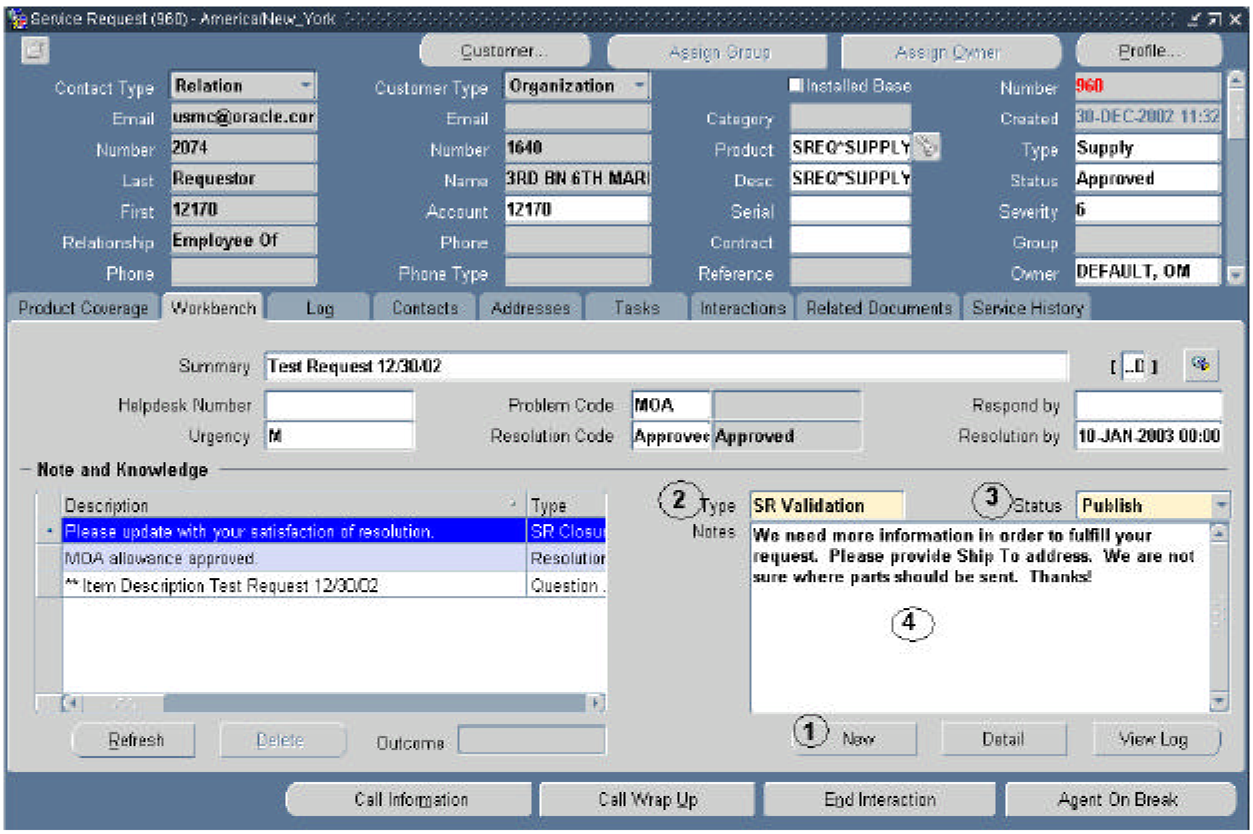


After exiting the flexfield, click on the  Button in the menu area to save your work.

Option 1: Decision Required

Additional information required from requestor for SR validation

If the CSE needs additional information from the requestor to determine how the SR should be handled then the CSE should write a note to the Requestor using the Note capability provided in the software.



1. Click on New button in the notes area.
2. Select/Enter Note Type = 'SR Validation'
3. Select Note Status = 'Publish'
4. Enter Note texts to be viewed by requestor.
5. Click on the  Button in the menu area to save your work.

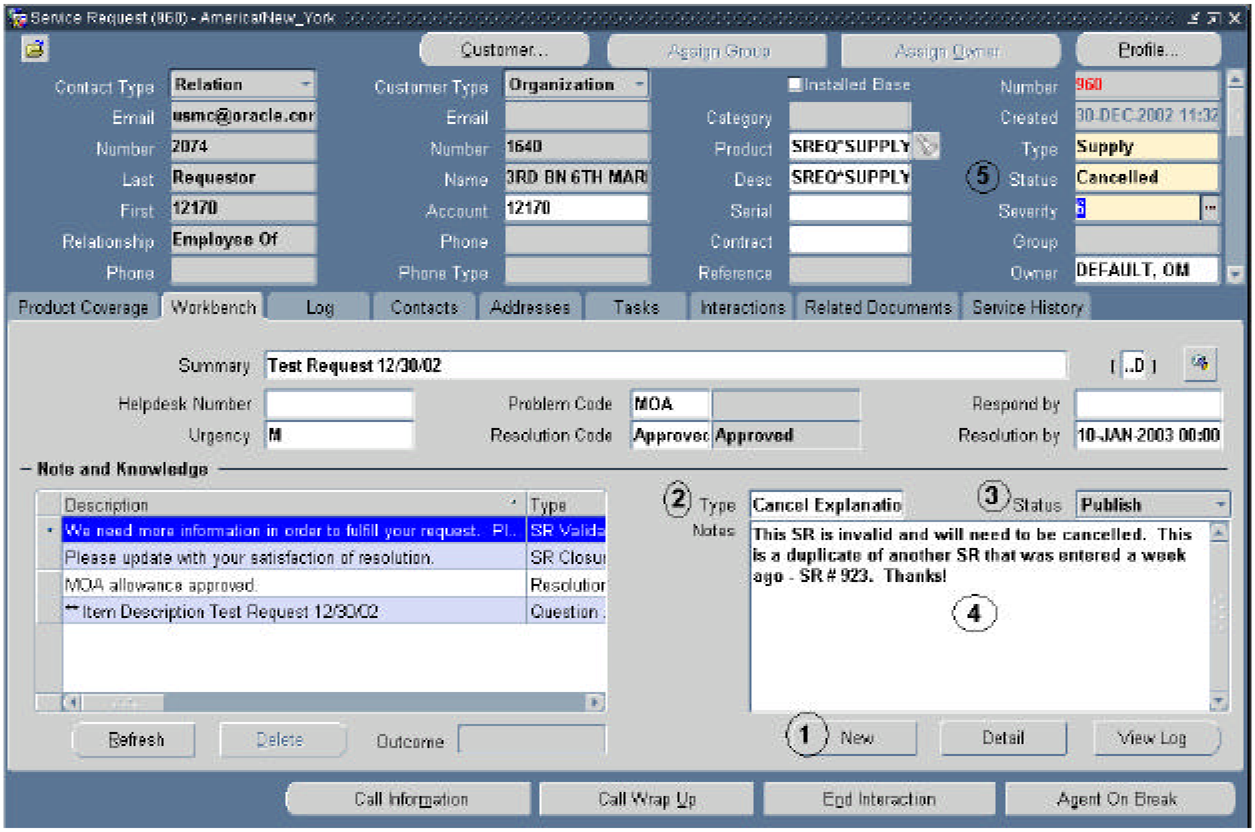
☞ **Attention:** To write a note to the Requestor, you can also refer to Section 2.5 of the document titled "Exchanging Notes with a Requestor or Customer Support Resource ".

You will need to requery this Service Request going forward to verify whether the requestor has submitted a response. A requestor comment submitted through iSupport would most likely appear in TeleService as an 'iSupport Update' Note Type. Once you have enough information to determine a Course of Action (COA) you can proceed to the decision point of resolving the SR through the local Customer Support Center capacity or through MATCOM CSC.

Option 2: Decision Required

SR Invalid – Cancellation Required

If the CSE determines that the SR is invalid, he/she should create a Note to the Requestor informing him/her why the request is invalid and should change the Status of the SR to a Status of "Cancelled" by selecting Cancelled from the Status LOV ... on the SR and no other action will need to be performed.

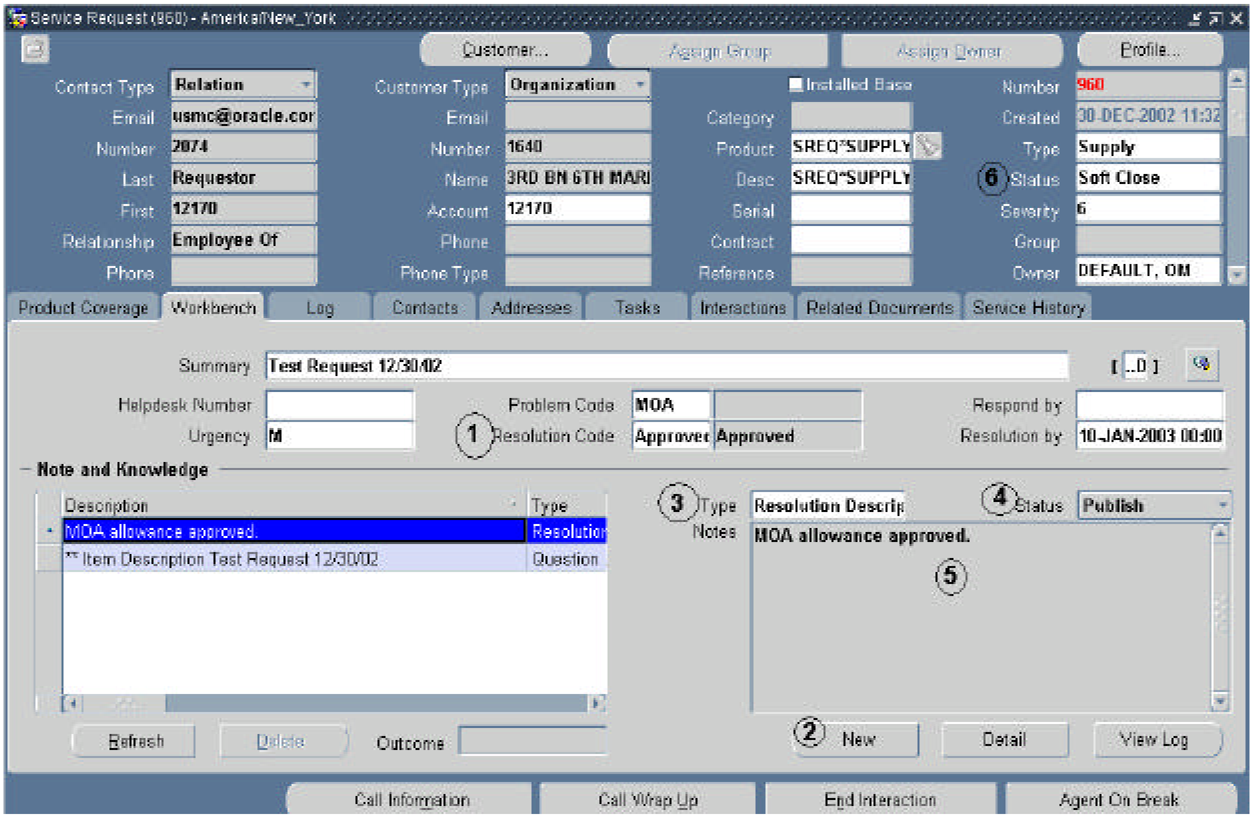


1. Click on New button in the notes area.
2. Select/Enter Note Type = ‘Cancel Explanation’
3. Select Note Status = ‘Publish’
4. Enter Note texts to be viewed by requestor.
5. Select/Enter SR Status = ‘Cancelled’
6. Click on the  Button in the menu area to save your work.

Option 3: Decision Required

SR Resolved by CSE

After researching the problem underlying the SR, the CSE may determine that the SR can be resolved with minimal effort and does not require additional assistance. In this case, the CSE will populate the appropriate SR resolution fields to publish to the requestor for approval.



1. Resolution Code – Inquiry resolution categories that can be used for future analysis.
2. Click on New button in Notes area.
3. If you want to enter more detail about the resolution, you can create a note corresponding to the resolution. Enter Note Type = Resolution Description
4. Select Note Status = Publish.

☞ **Attention:** The Note Status of 'Publish' will publish the note to the requestor through iSupport. A note Status of 'Public' means that the note is only viewable by the TeleService user group who has access to the SR. A note Status of 'Private' is assigned to a note that is only viewable by the creator of the note. The 'Private' note status is not recommended for purposes of this pilot.

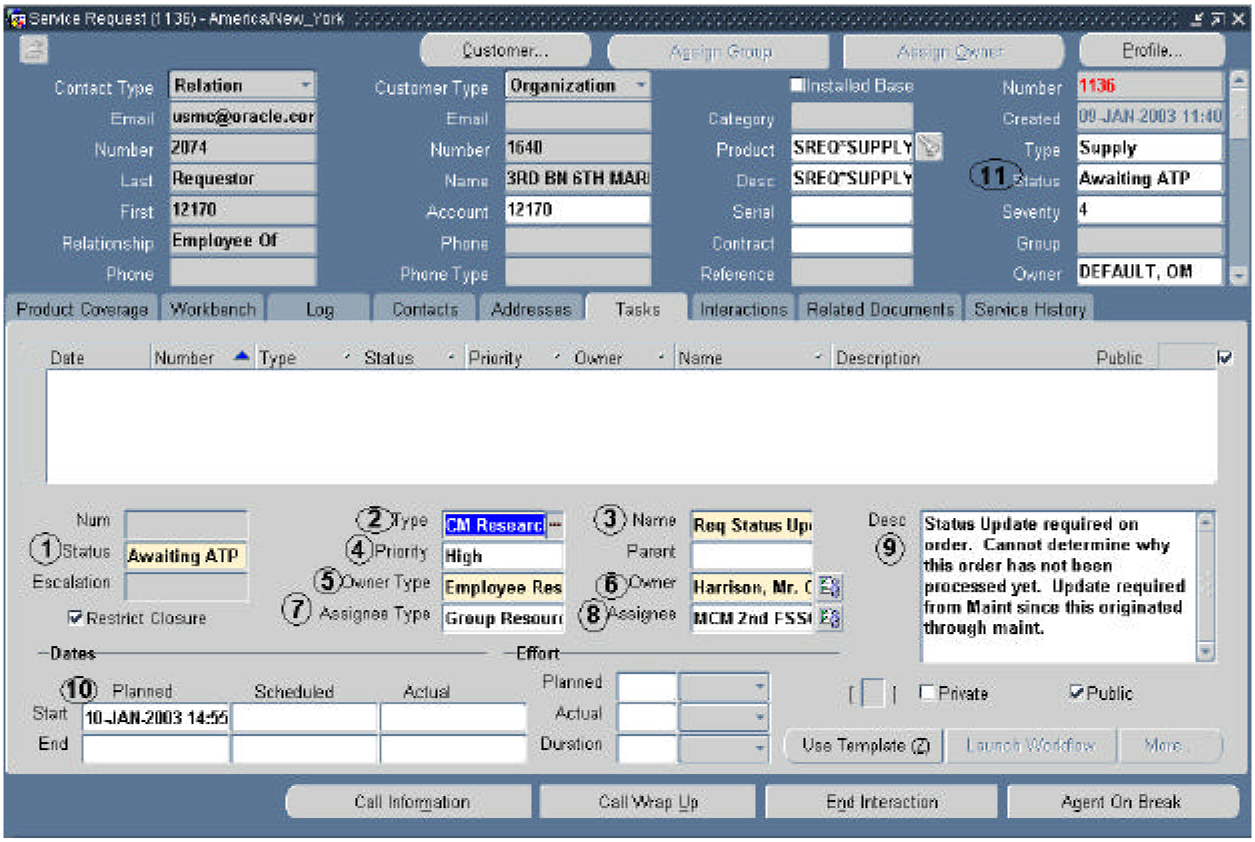
5. Enter note text.
6. Select SR status = 'Soft Close'
7. Repeat steps 2-5 to enter an additional note to be published to the requestor for sign-off on SR resolution. Note Type = 'SR Closure Approval' and Note Status = 'Publish.'
8. Click on the  Button in the menu area to save your work.

Option 4: Decision Required

SR Resolution Assistance through Local Resource

Should the CSE require additional assistance in fulfilling a SR or a portion of a SR that can be accomplished through his/her local S1 Customer Support Capacity, he/she may task to a local resource. The CSE will determine the most appropriate resource group for resolution based on the nature of the issue and the type of research required.

Service Request > Task Tab



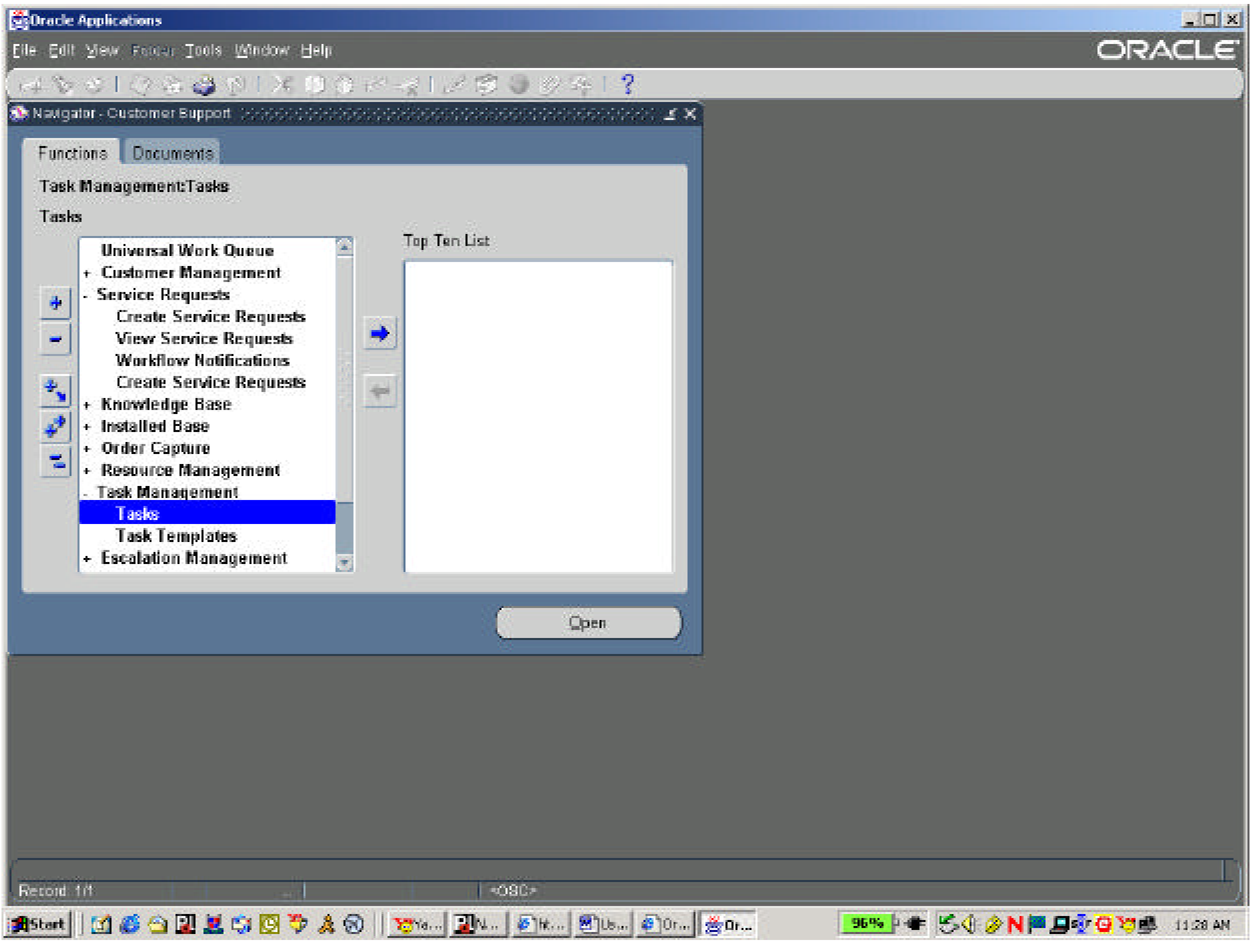
1. Enter/Select Task Status = ‘Awaiting ATP.’ Awaiting ATP def’n: Awaiting expected completion date from local resource on task.
2. Enter/Select Task Type = ‘CM Research.’ CM Research def’n: Assistance required from Capacity Manager(s)
3. Enter Task Name as intuitive short description
4. Enter/Select Task Priority = High, Medium, or Low

5. Enter/Select Owner Type = ‘Employee Resource.’ The value ‘Employee Resource’ allows you to select a person as the task assigner in the next field.
6. Enter/Select yourself as the owner (assigner) of the task.
7. Enter/Select Assignee Type = ‘Group Resource.’ The value ‘Group Resource’ allows you to assign the task to a group of users (i.e. Capacity Managers). Thus, the users in the group can select a task to work from the Task Manager inbox of tasks assigned to their group.
8. Enter/Select Assignee = group to whom task should be assigned (i.e. MCM for Maintenance Capacity Managers).
9. Enter a short description for the task in the Desc field.
10. Enter the expected completion date for the task in the format DD-MM-YYYY. Keep in mind that this date should be no greater than the Required Resolution Date provided by the customer in the ‘Question Data’ Notes field.
11. Enter/Select SR Status = ‘Awaiting ATP.’ Awaiting ATP def’n: Awaiting expected completion date from local resource for all tasks associated to SR.
12. Click on the Button in the menu area to save your work.

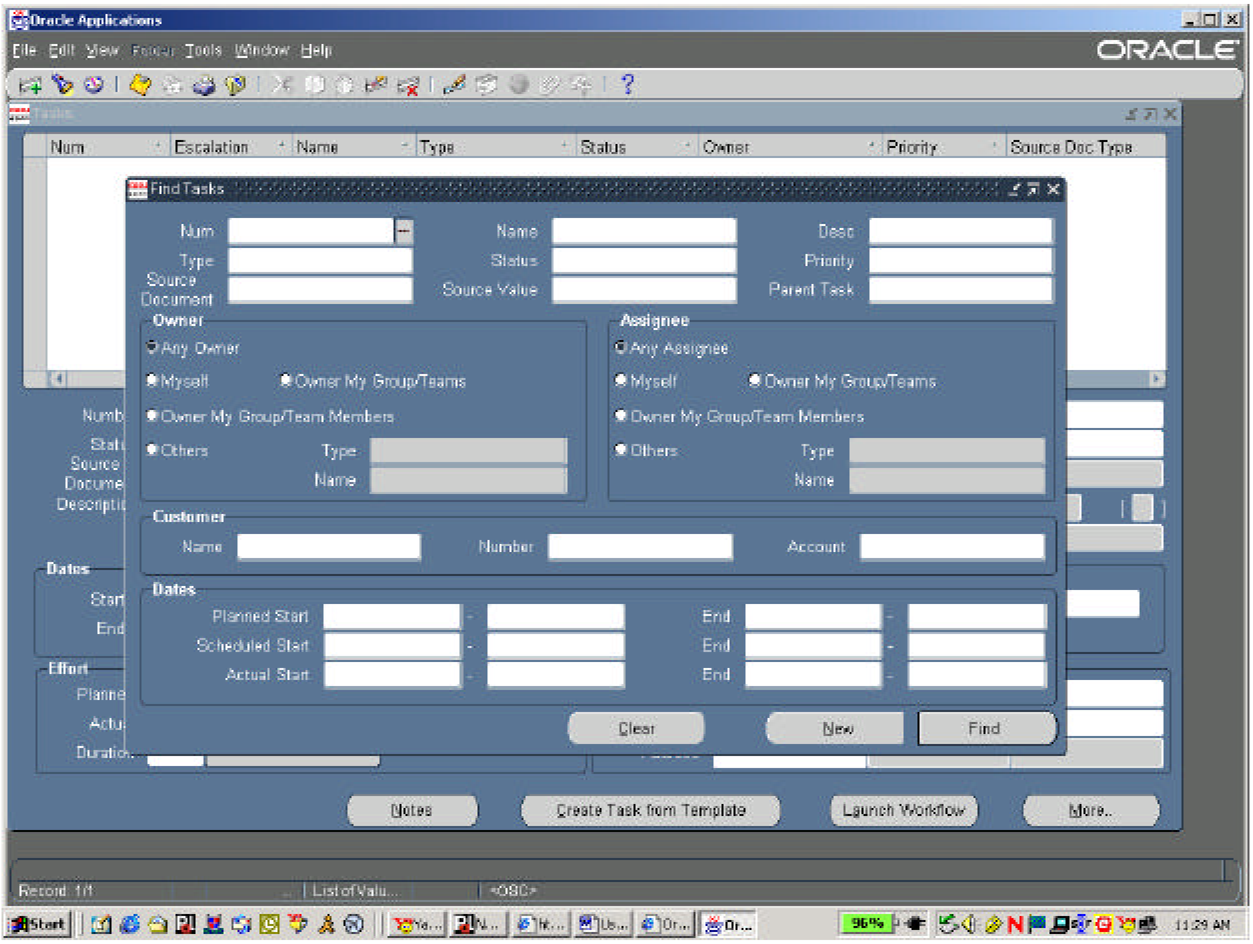
4.4 RECEIPT OF A TASK BY CAPACITY MANAGER GROUP

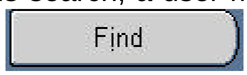
Attention: This section of the document assumes that the user is a Capacity Manager.

The Capacity Manager will first locate tasks that are in their work queue and then assess the nature of each Task by reviewing some key fields entered by the CSE. To determine what has been “Tasked” to the MCM group, MCMs may search for Tasks that have a status of “Awaiting ATP”. Within the customer support responsibility, a user may navigate to Task Management > Tasks from the customer support navigator window and open the Tasks menu option.


Oracle Applications
File Edit View Folder Tools Window Help
ORACLE
Navigator - Customer Support
Functions
Documents
Task Management:Tasks
Tasks
Universal Work Queue
+ Customer Management
- Service Requests
Create Service Requests
View Service Requests
Workflow Notifications
Create Service Requests
+ Knowledge Base
+ Installed Base
+ Order Capture
+ Resource Management
- Task Management
Tasks
Task Templates
+ Escalation Management
Top Ten List
Open
Record: 1/1
<OSC>
Start
11:28 AM

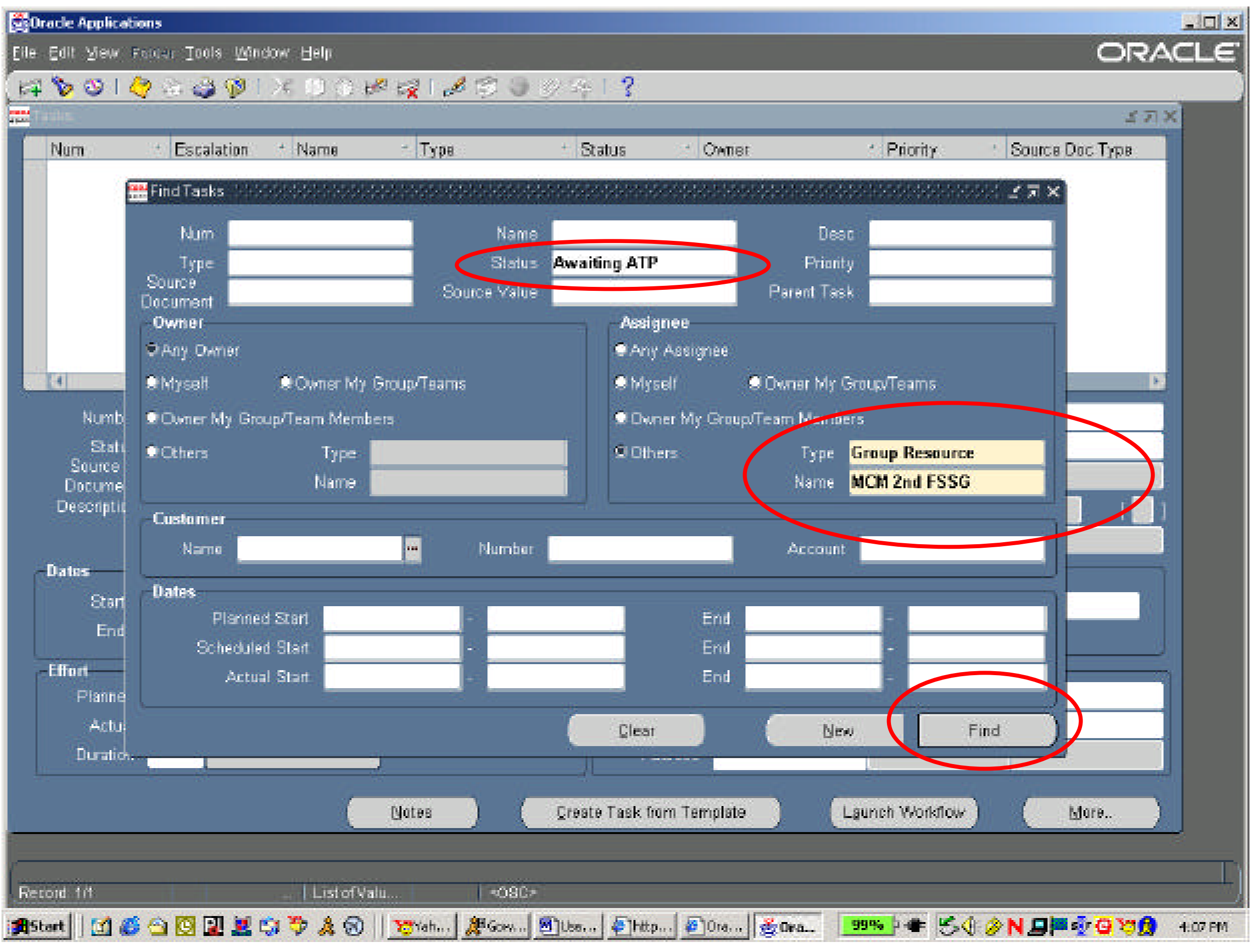
After opening the Tasks menu option, the user will see the following screen.



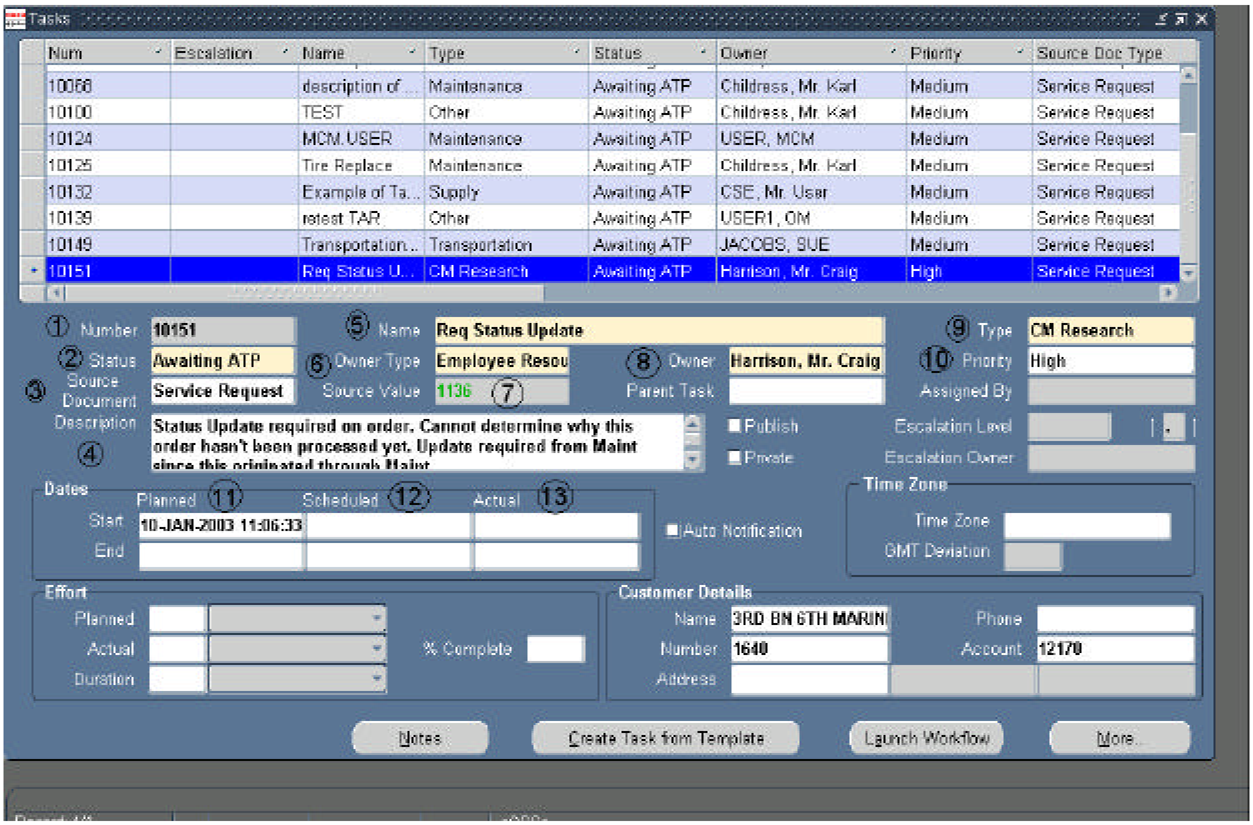
From this screen, the user may select different search criteria. In this case, we are assuming that the user is a MCM who is retrieving tasks that have been assigned to the MCM 2nd FSSG group. To determine the tasks that are in the MCM 2nd FSSG queue waiting to be worked, a user may search on the status "Awaiting ATP" and may limit the search by searching for Type = Group Resource and Name = MCM 2nd FSSG which signifies that the task has not yet been reviewed by an MCM. To perform this search, a user may select the status "Awaiting ATP" as the search criteria and then press the 

button to execute the search.

Attention: It's important to note that this search can be performed by any capacity manager. The MCM is used for the purposes of this example scenario.



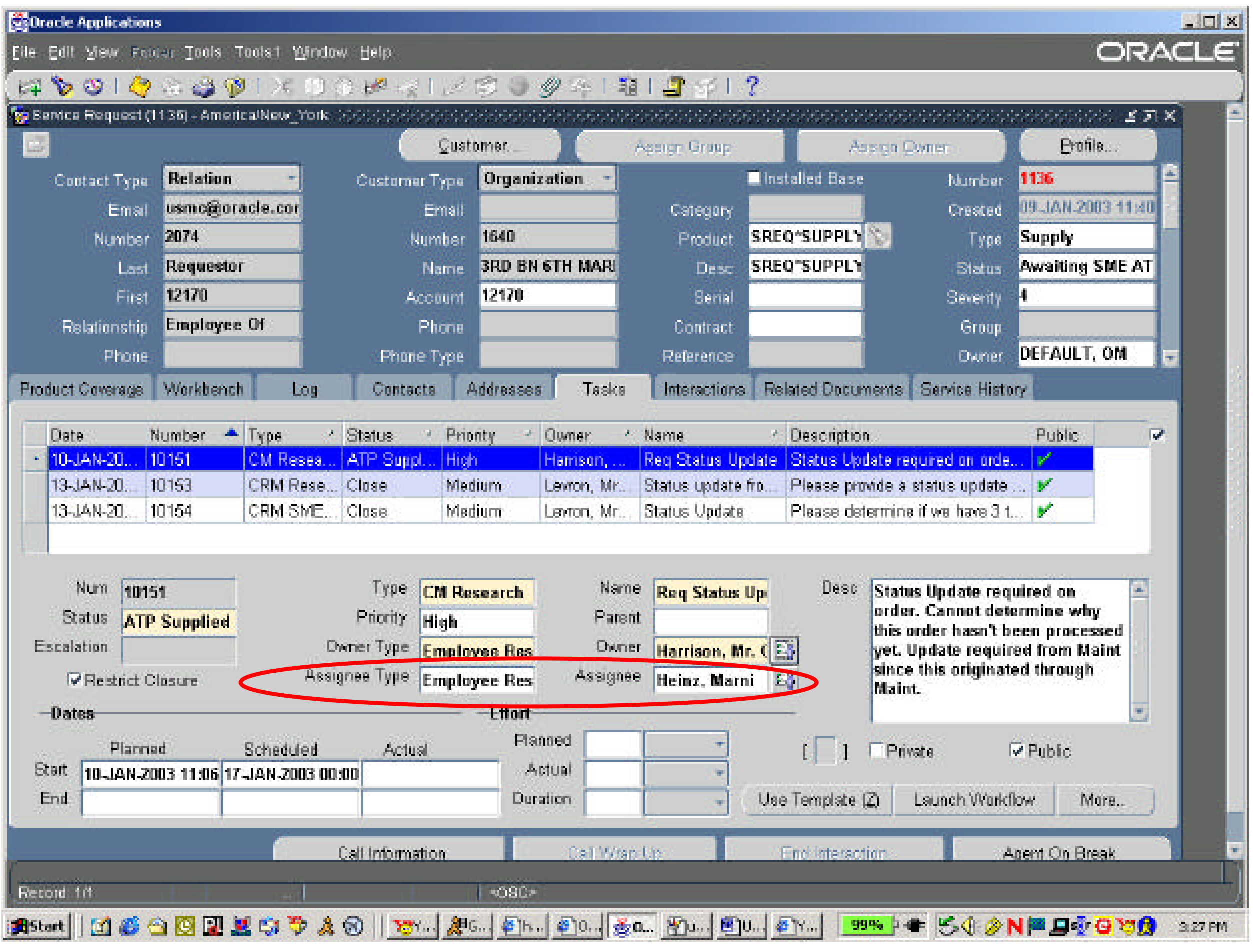
This search will return a results screen that looks similar to the screen below. From this screen, the MCM may assess the task, review it for accuracy, and determine if he/she is capable of completing the task.



1. Number – The number of the task. This number is automatically generated by Oracle when the task is created
2. Status – The is the current status of the task
3. Source Document – Signifies what the task is linked to
4. Description – Description of the task that needs to be completed
5. Name – Name of the task
6. Owner Type – The type of resource that owns the task
7. Source Value – The SR number that this task is attached to. The green text signifies that it is a hyperlink to the SR.
8. Owner – The owner of the task
9. Type – The type of task. Def'n: CM Research = Capacity Manager Research
10. Priority – The level of priority
11. Planned – The date when the task was created

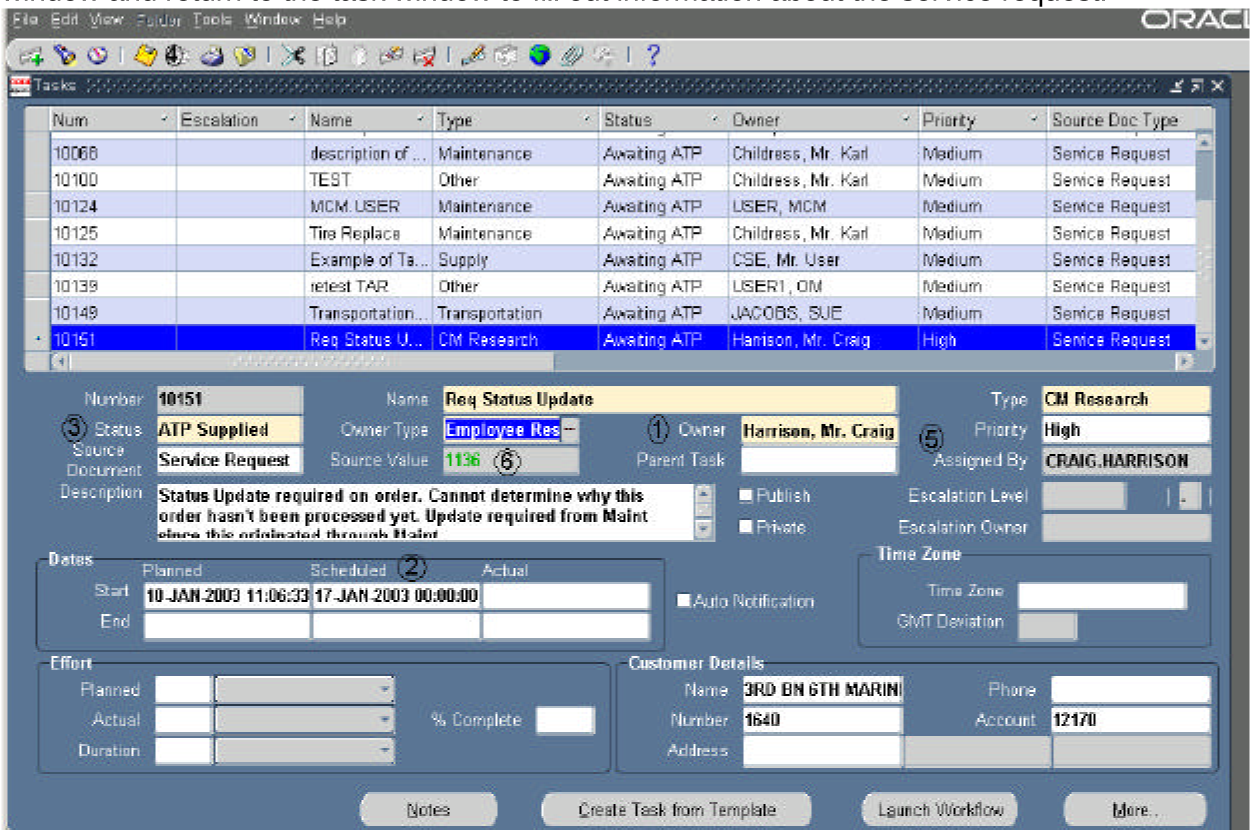
12. Scheduled – The date that the task is able to be completed by i.e. ATP (Available to Promise) Date
13. Actual – Actual date that the task is completed.

If the user can complete the task, then he/she will become the assignee of the task. If the user cannot complete the task, then he/she must create a note to the CSE informing him/her of the problem with the task. The MCM may become the assignee of the task by navigating to the SR by clicking on the Source Value and selecting "Employee Resource" as the Assignee Type and their own name as the Assignee.



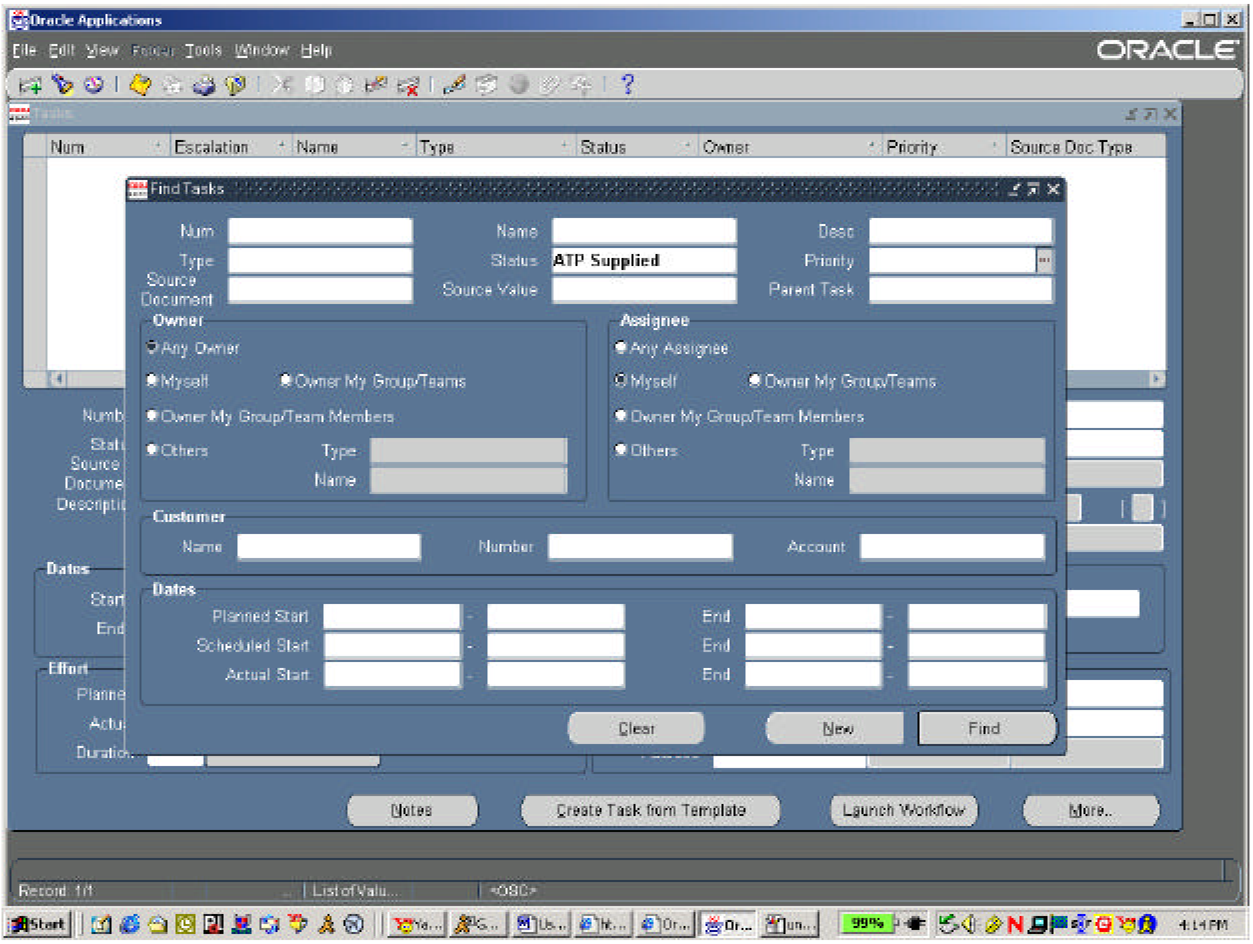
In this case, the MCM is Marni Heinz and she has assigned herself to the task.

After assigning herself to the task, Marni Heinz, as the capacity manager, should close the SR window and return to the task window to fill out information about the service request.

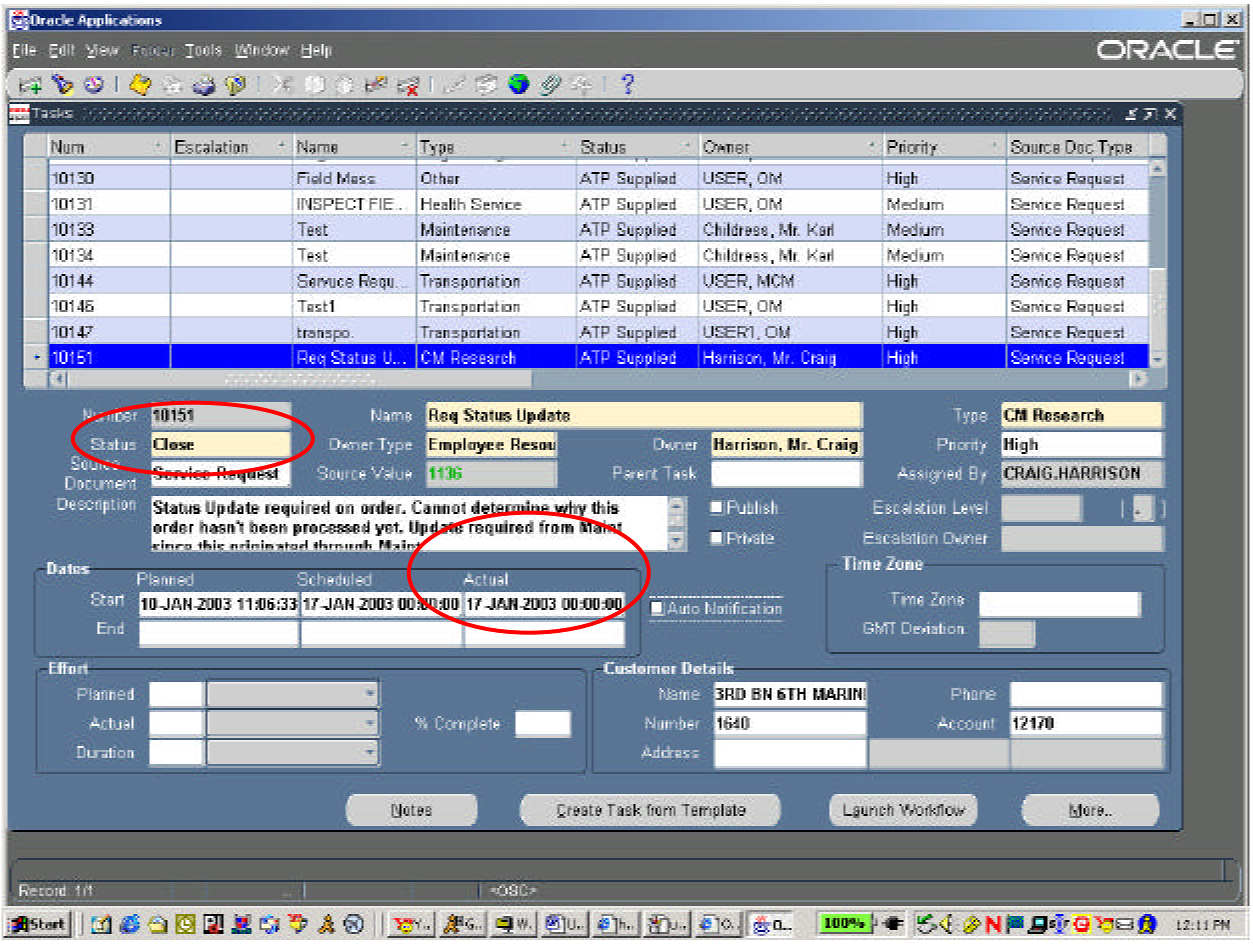


1. Owner – The owner remains Mr. Craig Harrison because he is the CSE that will resolve this task.
2. Scheduled Date – The ATP (Available to Promise) Date needs to be entered
3. Status – Once the ATP Date is entered, the status may be changed to ATP Supplied
4. Save – This record may be saved to record the changes
5. Assigned by – When the record is saved, the assigned by field is populated with the name of the current user. In this case, Craig Harrison is the current user and thus, the assigner.
6. Source Value – This value is the SR number that this task is attached to. This number is shown in green because it is a hyperlink to the SR. This link may be used to add notes to the SR.

The next step is for the MCM to supply the actual date that the task is completed after it has been completed and to change the Task Status to “Closed”. The representative may locate the task by searching for tasks with a status of “ATP Supplied”. They may further limit the search by selecting the “Myself” option to search for tasks assigned to them.



After closing the Task, the MCM has completed their task.

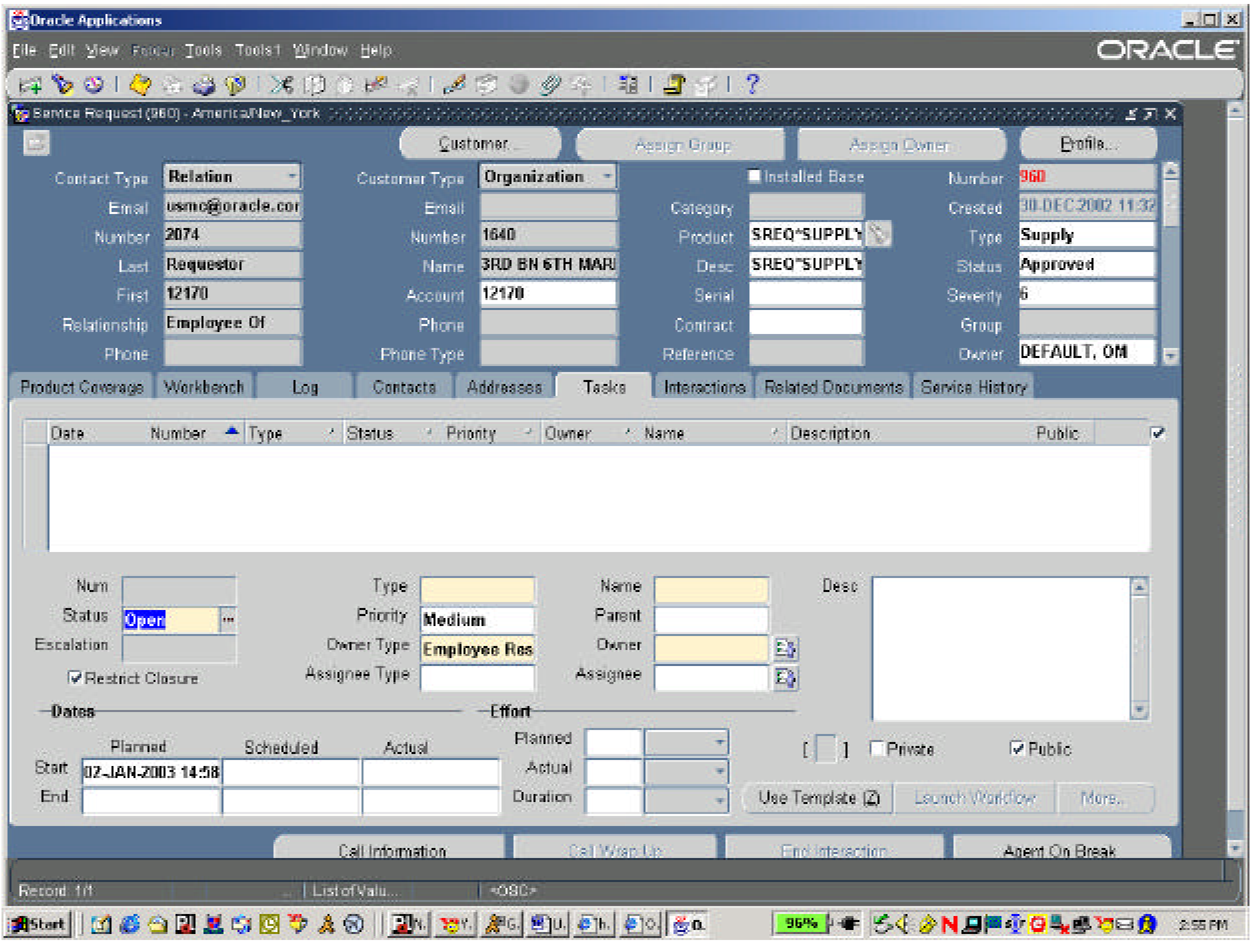


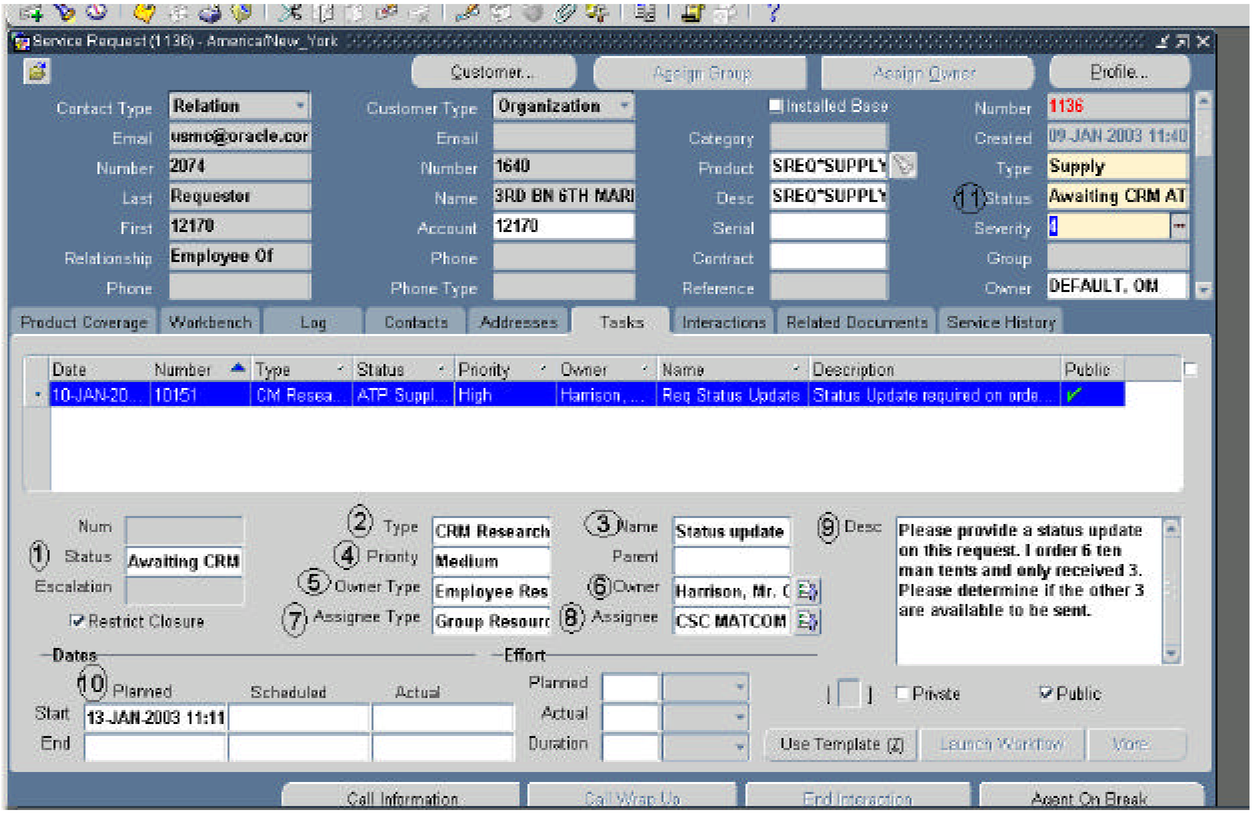
4.5 Tasking an SR (or portion of an SR) to MATCOM

Attention: This section of the document assumes that the user is a CSE

After changing the SR status to “Awaiting CRM ATP”, the next step is to create a task for either the fulfillment of the entire SR or a portion of the SR and to assign an owner to that task.

From the “Create Service Requests” screen, the first step is to click on the “Tasks” tab.


Oracle Applications
File Edit View Folder Tools Tools1 Window Help
ORACLE
Service Request (960) - America/New_York
Customer...
Assign Group
Assign Owner
Profile...
Contact Type
Relation
Email
usmc@oracle.cor
Number
2074
Last
Requestor
First
12170
Relationship
Employee Of
Phone
Customer Type
Organization
Email
Number
1640
Name
3RD BN 6TH MARI
Account
12170
Phone
Phone Type
Installed Base
Category
Product
SREQ^SUPPLY
Desc
SREQ^SUPPLY
Serial
Contract
Reference
Number
960
Created
30-DEC-2002 11:32
Type
Supply
Status
Approved
Severity
6
Group
Owner
DEFAULT, OM
Product Coverage
Workbench
Log
Contacts
Addresses
Tasks
Interactions
Related Documents
Service History
Date
Number
Type
Status
Priority
Owner
Name
Description
Public
Num
Status
Open
Escalation
Restrict Closure
Type
Priority
Medium
Owner Type
Employee Res
Assignee Type
Name
Parent
Owner
Assignee
Desc
Dates
Effort
Planned
Scheduled
Actual
Start
02-JAN-2003 14:58
End
Planned
Actual
Duration
Private
Public
Use Template (2)
Launch Workflow
More...
Call Information
Call Wrap Up
End Interaction
Agent On Break
Record: 1/1
List of Valu...
<OSC>
Start
96%
2:55 PM



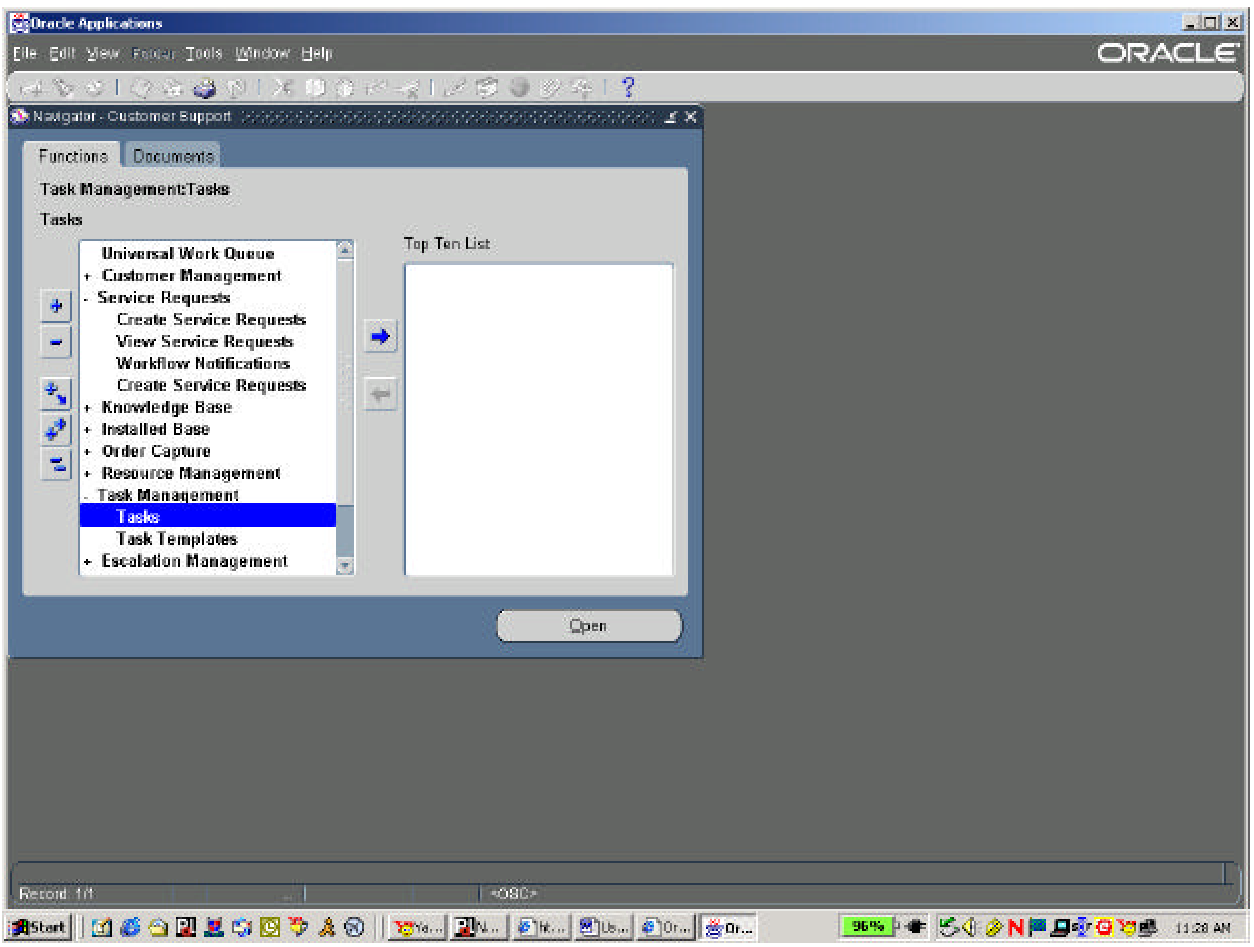
1. Enter/Select Task Status = 'Awaiting CRM ATP.' Awaiting CRM ATP def'n: Awaiting expected completion date from CRM resource on task.
2. Enter/Select Task Type = 'CRM Research.' CRM Research def'n: Assistance required from CRM representatives.
3. Enter Task Name as intuitive short description
4. Enter/Select Task Priority = High, Medium, or Low
5. Enter/Select Owner Type = 'Employee Resource.' The value 'Employee Resource' allows you to select a USMC as the task assigner in the next field.
6. Enter/Select yourself as the owner (assigner) of the task.
7. Enter/Select Assignee Type = 'Group Resource.' The value 'Group Resource' allows you to assign the task to a group of users (i.e. CSC MATCOM). Thus, the users in the group can select a task to work from the Task Manager inbox of tasks assigned to their group.
8. Enter/Select Assignee = group to whom task should be assigned (i.e. CSC MATCOM).
9. Enter a short description for the task in the Desc field.
10. Enter the expected completion date for the task in the format DD-MM-YYYY. Keep in mind that this date should be no greater than the Required Resolution Date provided by the customer in the 'Question Data' Notes field.
11. Enter/Select SR Status = 'Awaiting CRM ATP.' Awaiting CRM ATP def'n: Awaiting expected completion date from MATCOM for all tasks associated to SR.

12. Click on the  Button in the menu area to save your work.

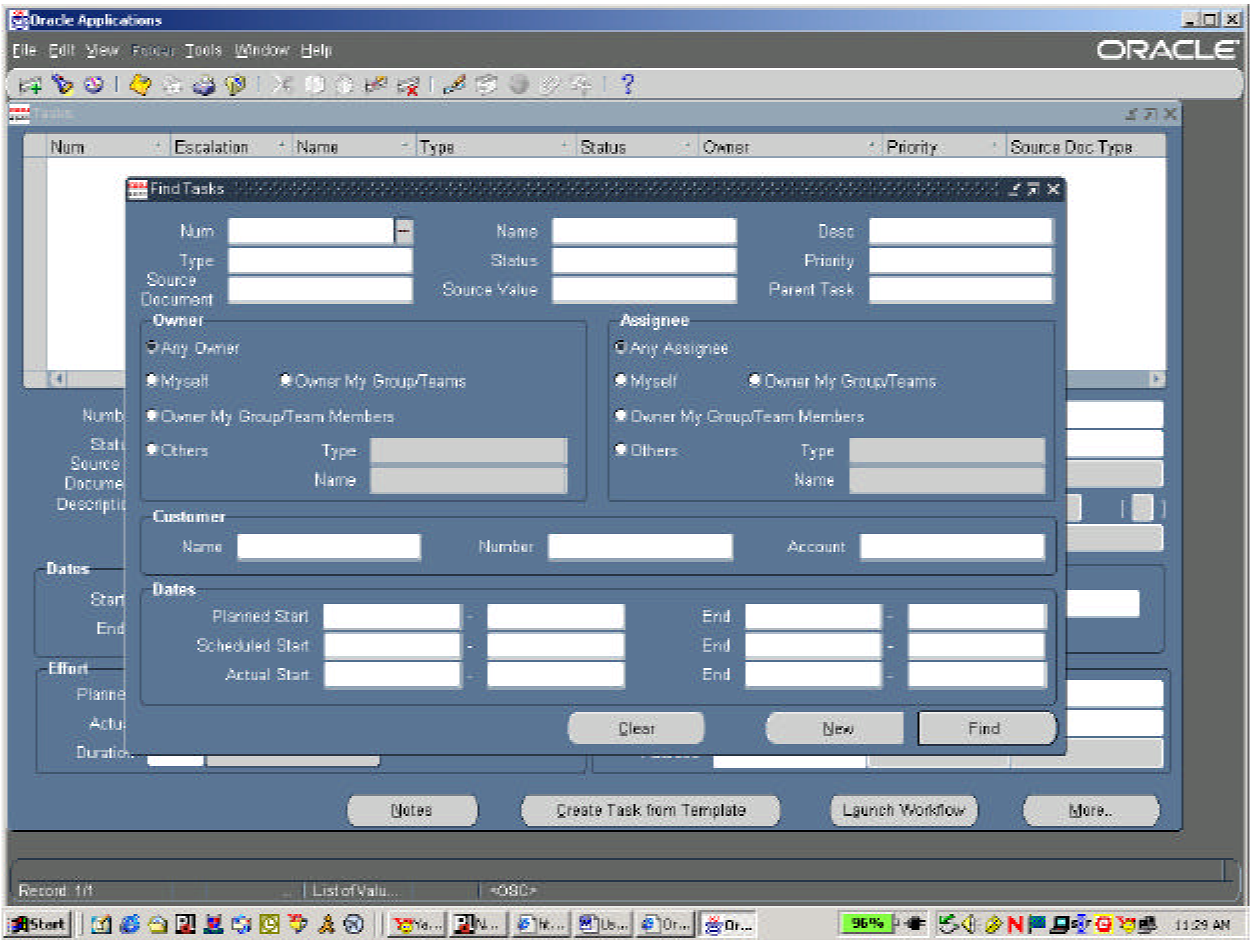
4.5.1 Receipt of a Task by MATCOM

Attention: This section of the document assumes that the user is a MATCOM CRM representative

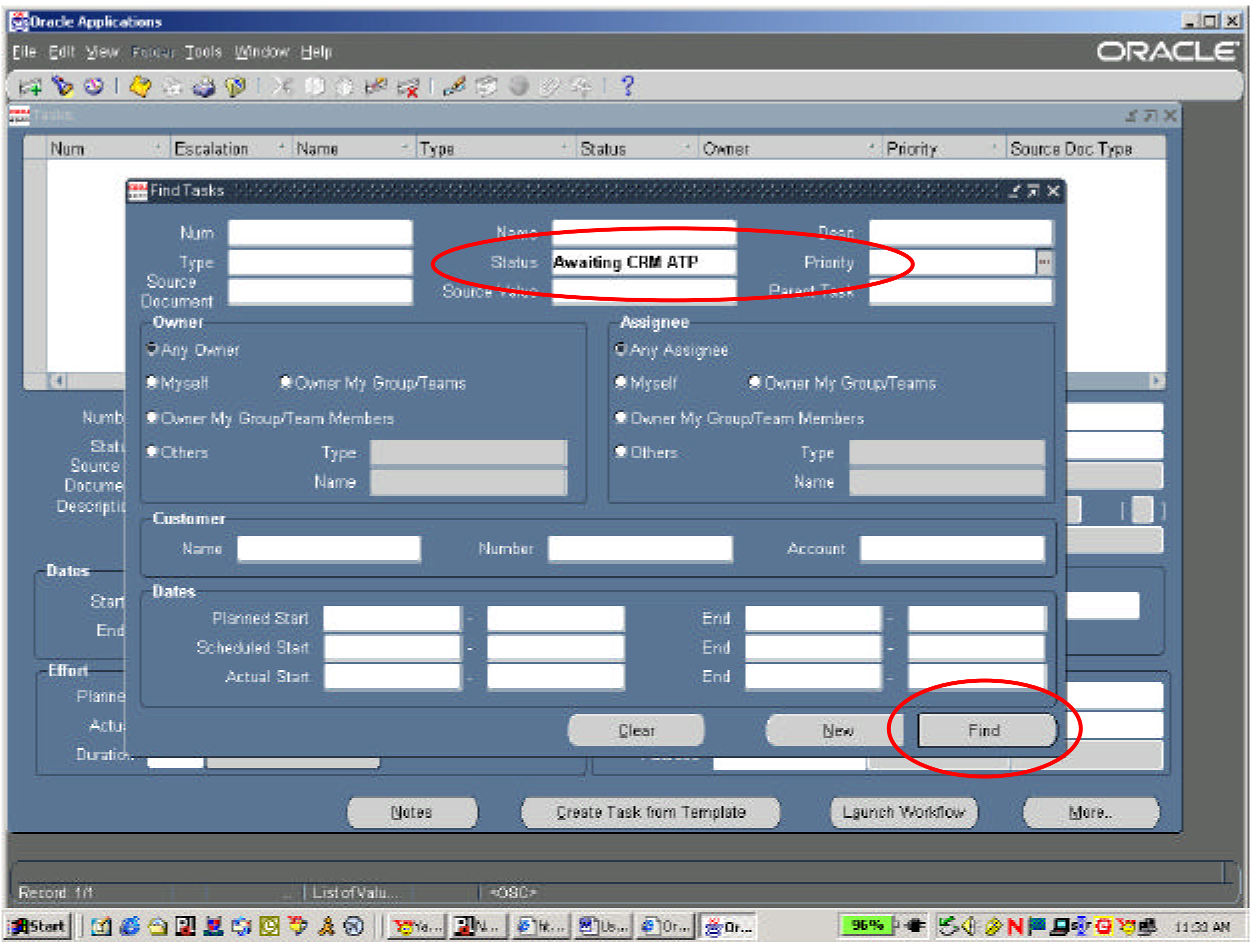
To determine what has been "Tasked" to MATCOM, MATCOM CRM personnel may search for Tasks that have a status of "Awaiting CRM ATP". Within the customer support responsibility, a user may navigate to Task Management > Tasks from the customer support navigator window and open the Tasks menu option.



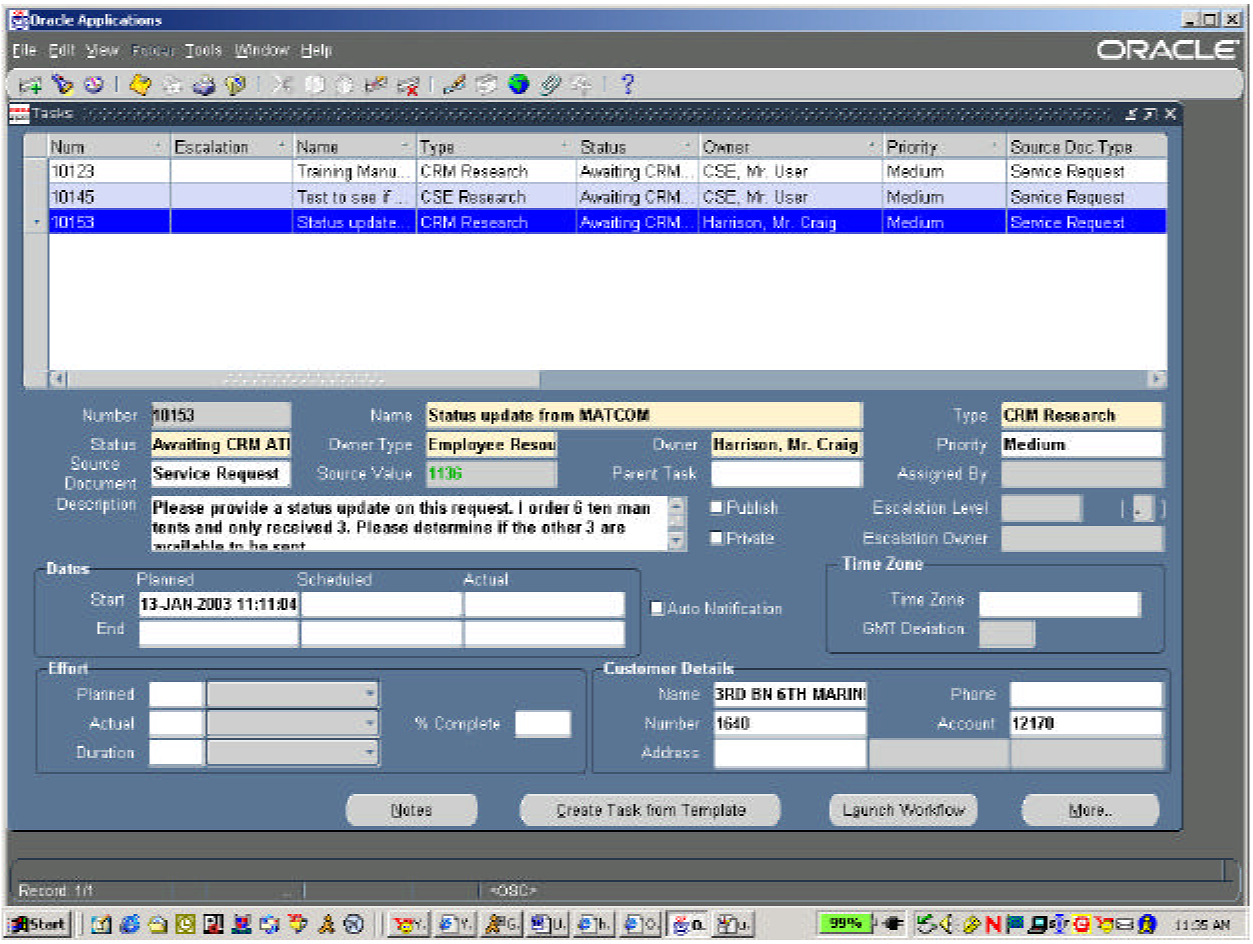
After opening the Tasks menu option, the user will see the following screen.



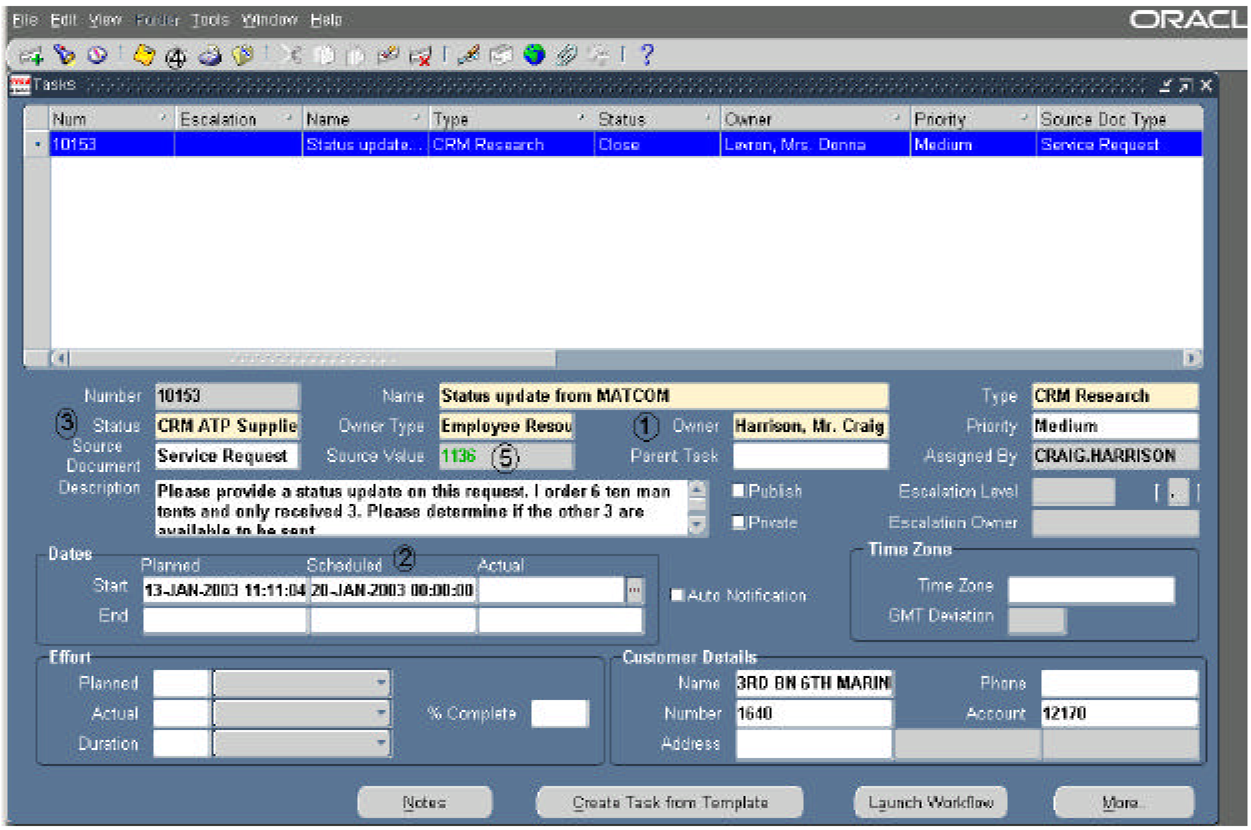
From this screen, the user may select different search criteria. In this case, we are assuming that the user is a MATCOM CRM representative who is retrieving tasks that have been assigned to the MATCOM CRM Group. To determine the tasks that are in the MATCOM CRM queue waiting to be worked, a user may search on the status "Awaiting CRM ATP" which signifies that the task has not yet been reviewed by a MATCOM representative. To perform this search, a user may select the status "Awaiting CRM ATP" as the search criteria and then press the Find button to execute the search.



This search will return a results screen that looks similar to the screen below.

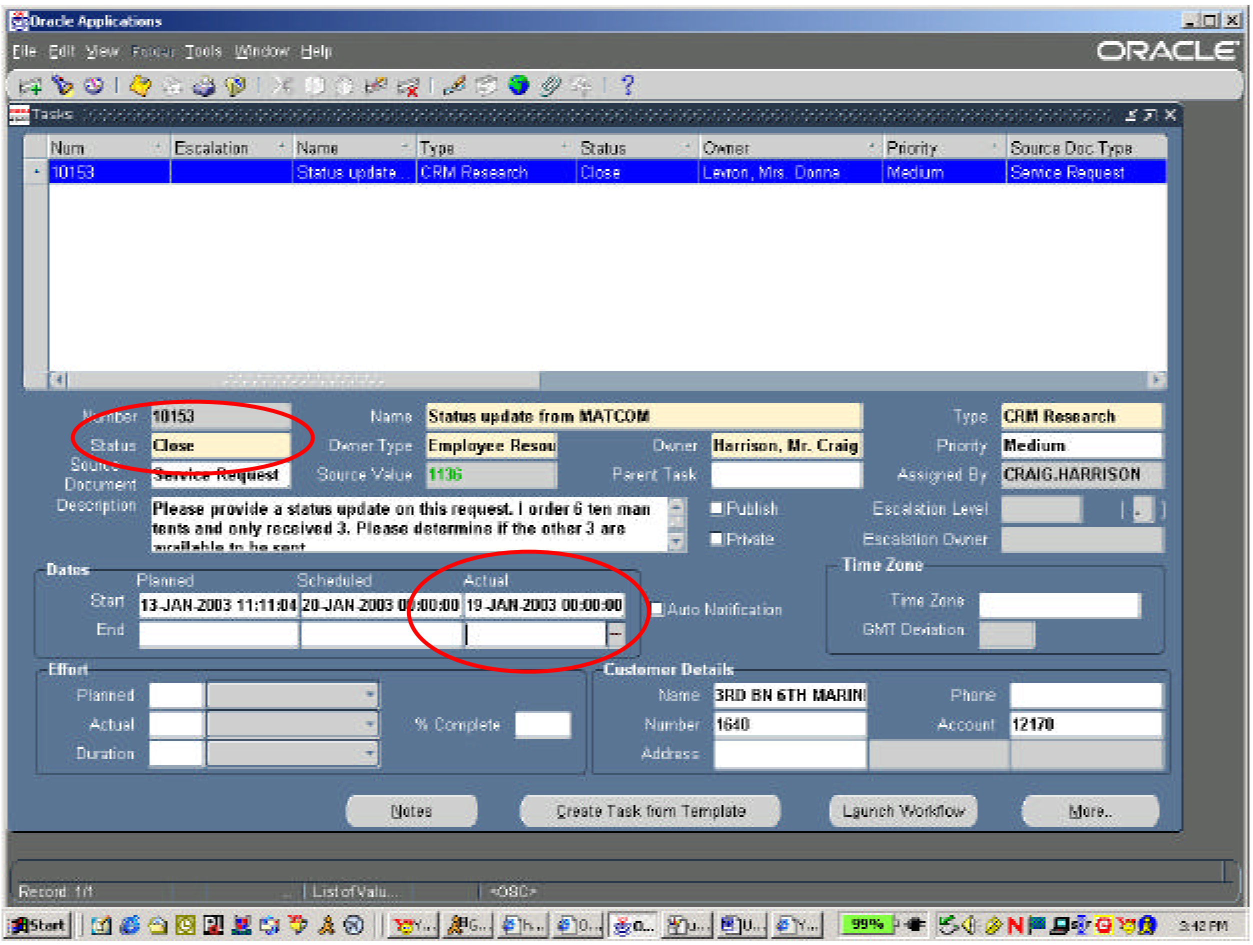


From this screen, the MATCOM representative may review the task and determine if he/she is capable of completing the task. If the user can complete the task, then he/she will become the assignee of the task. If the user cannot complete the task, then he/she must create a note to the CSE informing him/her of the problem with the task.



1. Owner – The owner remains Craig Harrison because he is the CSE ultimately responsible for resolving this task.
2. Scheduled Date – The CRM ATP (Available to Promise) Date needs to be entered
3. Status – Once the CRM ATP Date is entered, the status may be changed to CRM ATP Supplied
4. Save – This record may be saved to record the changes
5. Source Value – This value is the SR number that this task is attached to. This number is shown in green because it is a hyperlink to the SR. This link may be used to add notes to the SR.

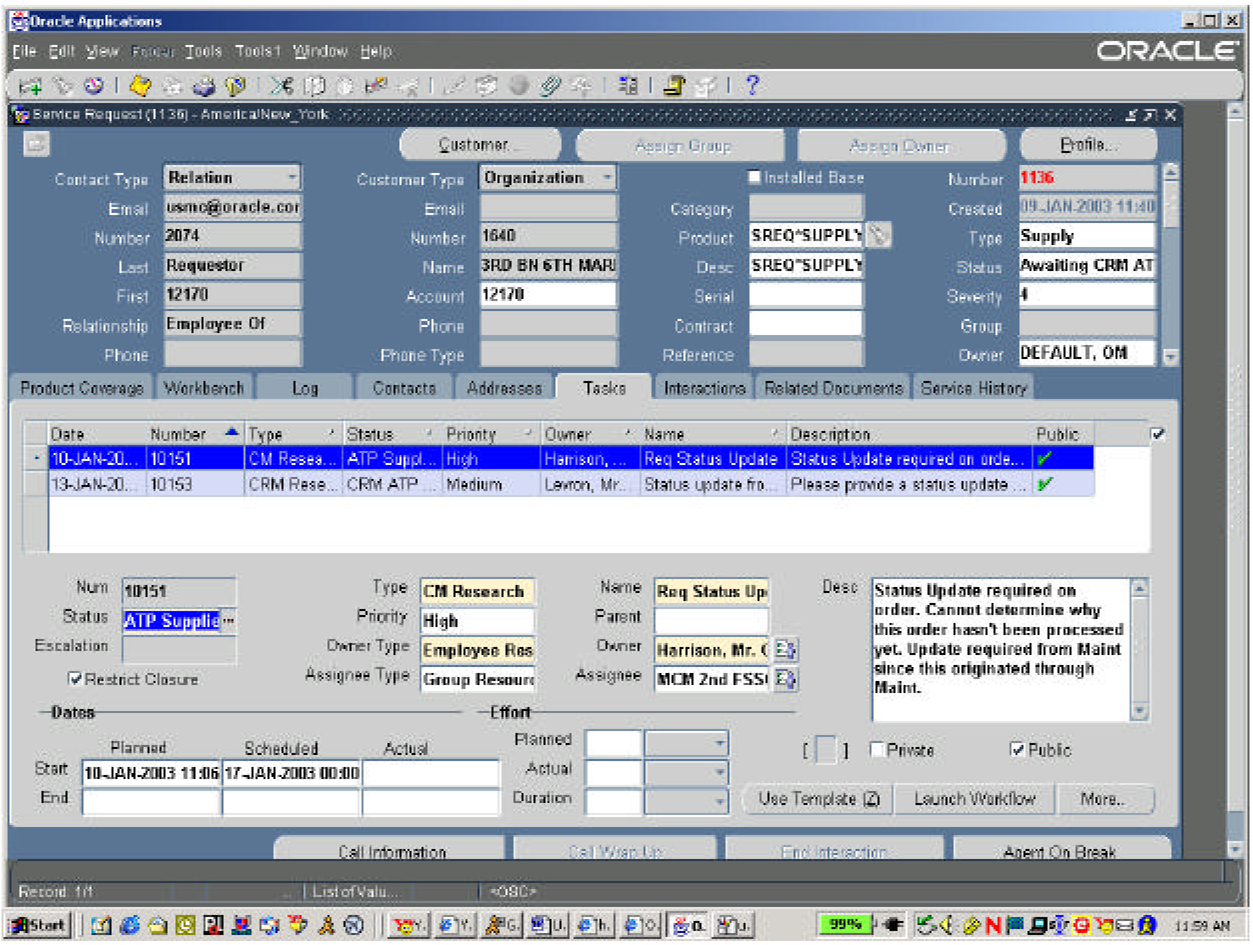
The next step is for the MATCOM CRM Representative to supply the actual date that the task is completed and to change the Task Status to “Closed”. The representative may locate the task by searching for tasks with a status of “CRM ATP Supplied”. After closing the Task, the MATCOM CRM Representative has completed their task.



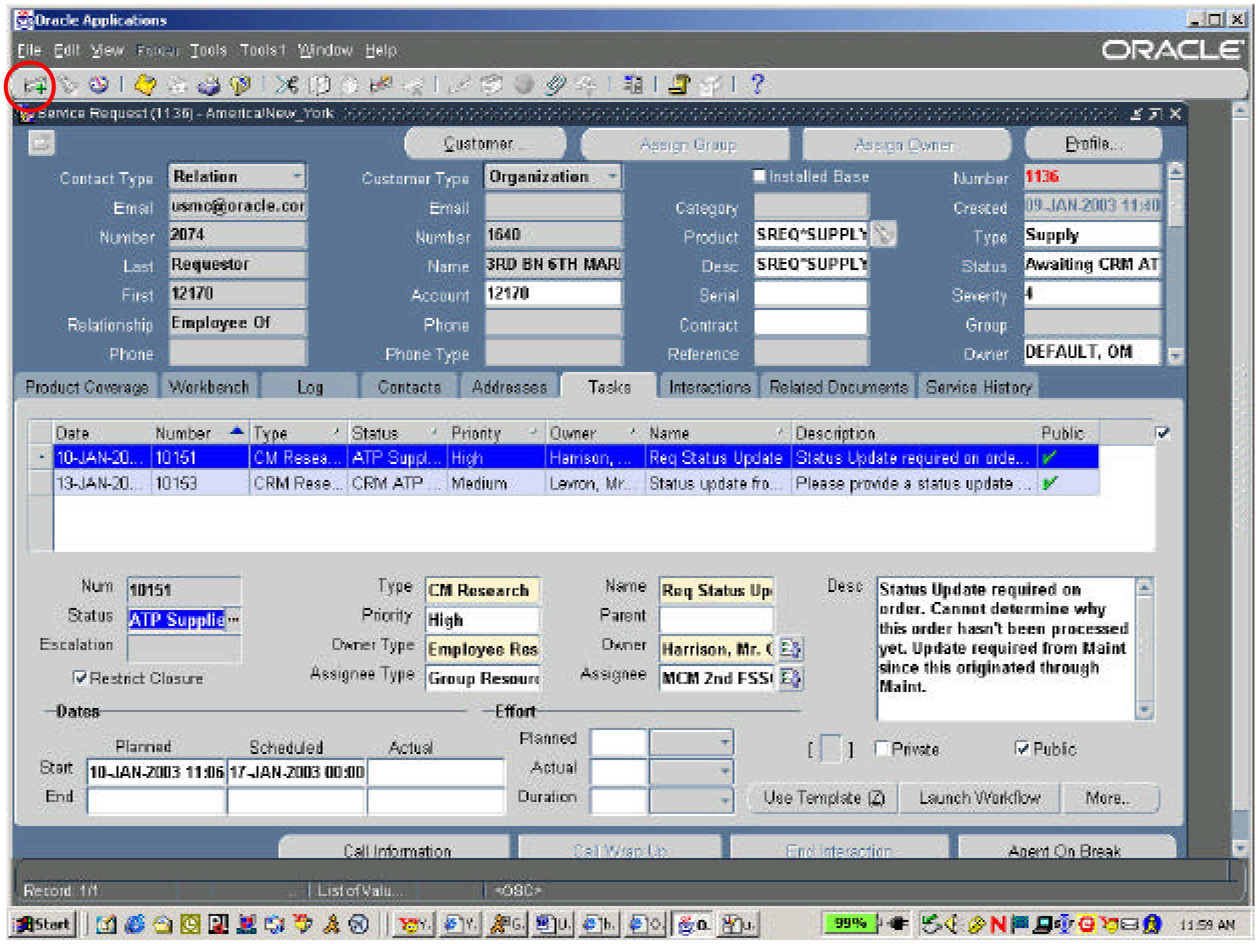
4.4.2 Sub-Tasking to a MATCOM SME

Attention: This section of the document assumes that the user is a MATCOM CRM representative.

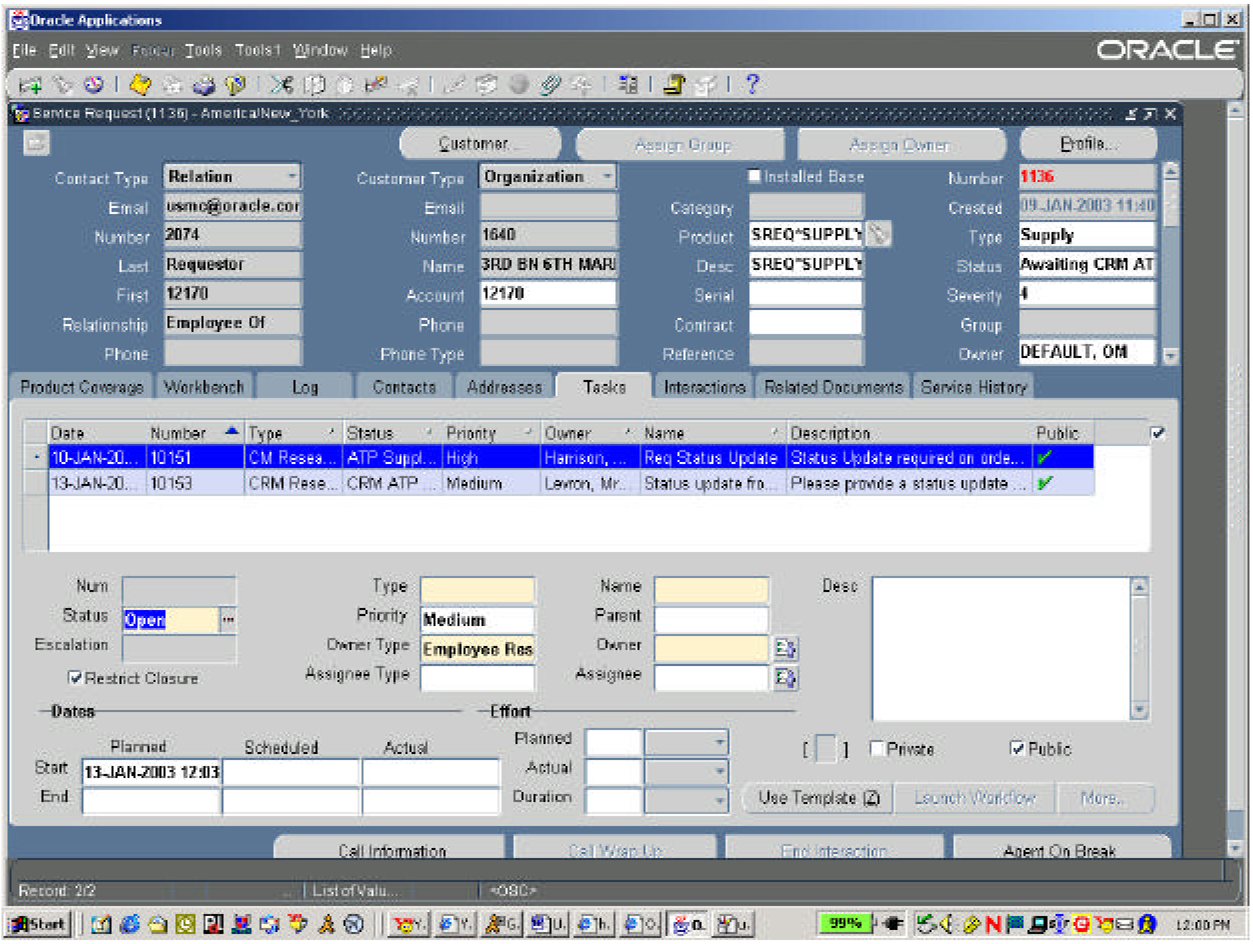
If the MATCOM representative is not able to fulfill the SR, the representative may create a sub task to be completed by a subject matter expert. To create a sub task, the representative must review the original task that was assigned to him/her, decide who is the appropriate SME to complete the task, and then create a sub task that is linked to the original task. Navigating to the screen that displays the Tasks tab on the SR begins this process. An example of this screen is shown:

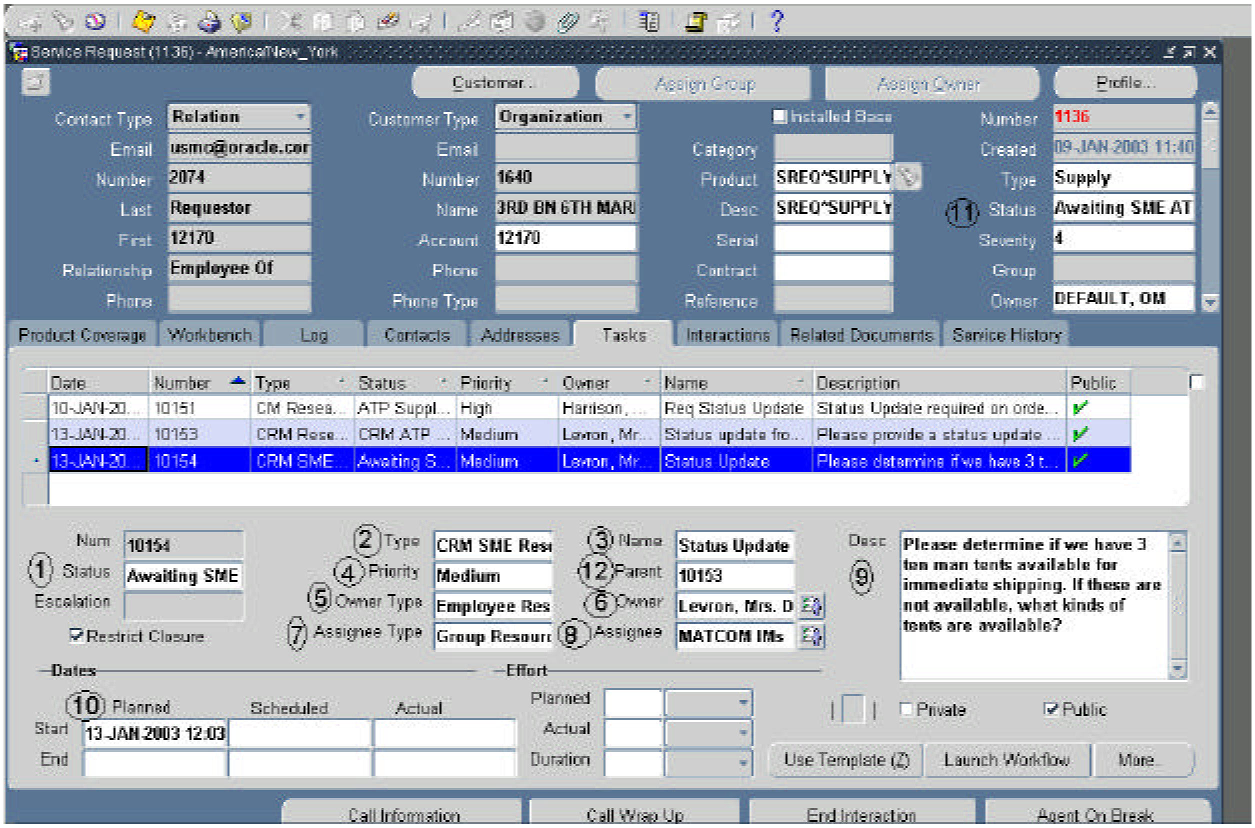


The next step is to create a new task by clicking on the  button



This will produce the following screen. From this screen, a new Task can be created.


Oracle Applications
File Edit View Folder Tools Tools1 Window Help
ORACLE
Service Request (1136) - America/New_York
Customer...
Assign Group
Assign Owner
Profile...
Contact Type Relation
Email usmc@oracle.cor
Number 2074
Last Requestor
First 12170
Relationship Employee Of
Phone
Customer Type Organization
Email
Number 1640
Name 3RD BN 6TH MARI
Account 12170
Phone
Phone Type
Installed Base
Category
Product SREQ^SUPPLY
Desc SREQ^SUPPLY
Serial
Contract
Reference
Number 1136
Created 09-JAN-2003 11:40
Type Supply
Status Awaiting CRM AT
Severity 4
Group
Owner DEFAULT, OM
Product Coverage
Workbench
Log
Contacts
Addresses
Tasks
Interactions
Related Documents
Service History
Date Number Type Status Priority Owner Name Description Public
10-JAN-20... 10151 CM Resea... ATP Suppl... High Harrison, ... Req Status Update Status Update required on orde...
13-JAN-20... 10153 CRM Rese... CRM ATP ... Medium Lemon, Mr... Status update fro... Please provide a status update ...
Num
Status Open
Escalation
Restrict Closure
Type
Priority Medium
Owner Type Employee Res
Assignee Type
Name
Parent
Owner
Assignee
Desc
Dates
Planned
Scheduled
Actual
Start 13-JAN-2003 12:03
End
Effort
Planned
Actual
Duration
Private
Public
Use Template (Z)
Launch Workflow
More...
Call Information
Call Wrap Up
End Interaction
Agent On Break
Record: 2/2
List of Valu...
<OSC>
Start
12:00 PM



1. Enter/Select Task Status = 'Awaiting SME ATP.' Awaiting SME ATP def'n: Awaiting expected completion date from a SME resource on task.
2. Enter/Select Task Type = 'CRM SME Research.' CRM SME Research def'n: Assistance required from SME CRM representatives.
3. Enter Task Name as intuitive short description
4. Enter/Select Task Priority = High, Medium, or Low
5. Enter/Select Owner Type = 'Employee Resource.' The value 'Employee Resource' allows you to select a USMC as the task assigner in the next field.
6. Enter/Select yourself as the owner (assigner) of the task.
7. Enter/Select Assignee Type = 'Group Resource.' The value 'Group Resource' allows you to assign the task to a group of users (i.e. MATCOM IMs). Thus, the users in the group can select a task to work from the Task Manager inbox of tasks assigned to their group.
8. Enter/Select Assignee = group to whom task should be assigned (i.e. MATCOM IMs).
9. Enter a short description for the task in the Desc field.
10. Enter the expected completion date for the task in the format DD-MM-YYYY. Keep in mind that this date should be no greater than the Required Resolution Date provided by the customer in the 'Question Data' Notes field.
11. Enter/Select SR Status = 'Awaiting SME ATP.' Awaiting SME ATP def'n: Awaiting expected completion date from MATCOM SME for all tasks associated to SR.

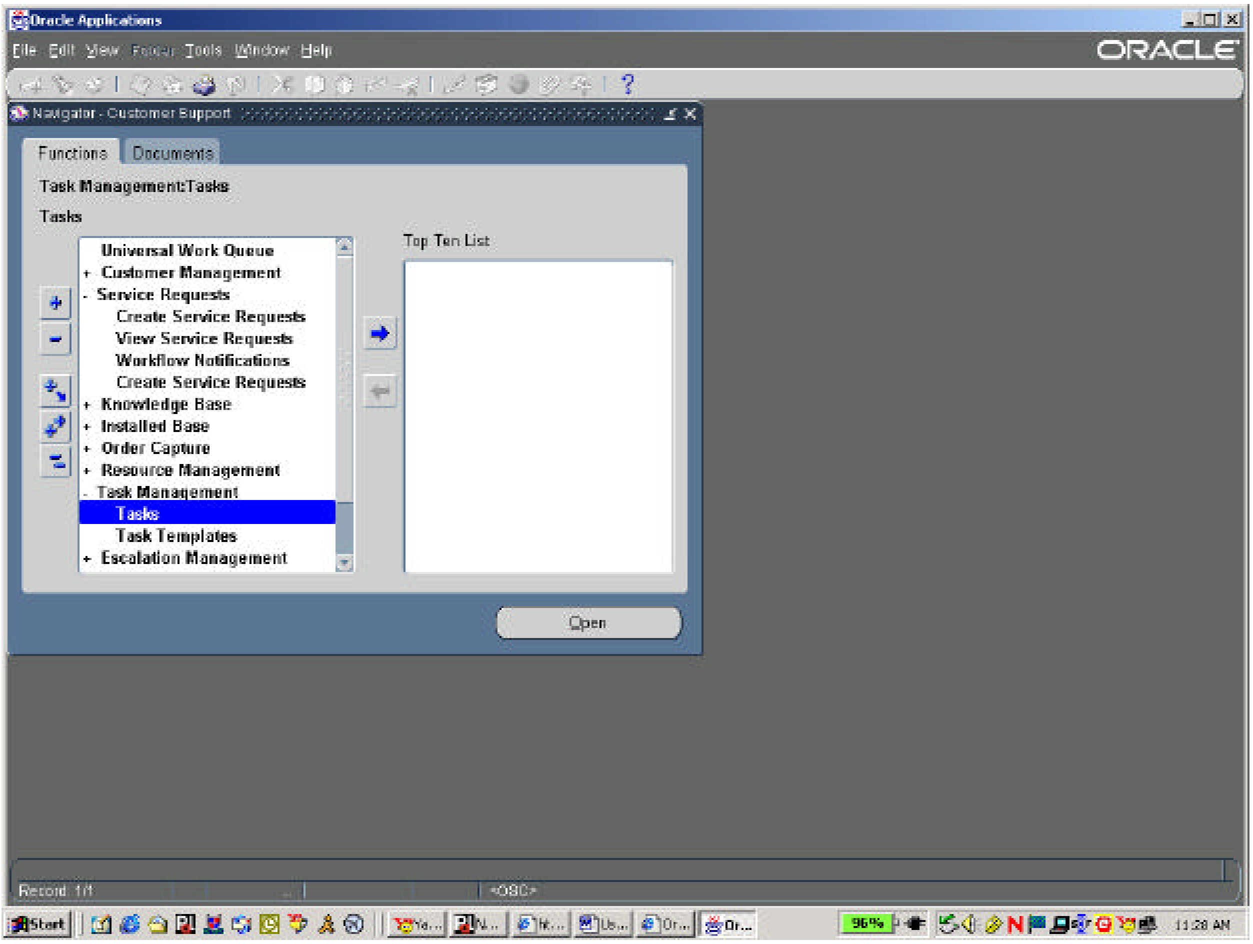
12. Parent – The number of the task that the sub-task is linked to.
13. Click on the  Button in the menu area to save your work.

At this point of this example, the MATCOM CRM representative has assigned the task to the MATCOM IMs group and the MATCOM CRM representative will need to wait for the MATCOM IMs group to work the task, just as they would work tasks.

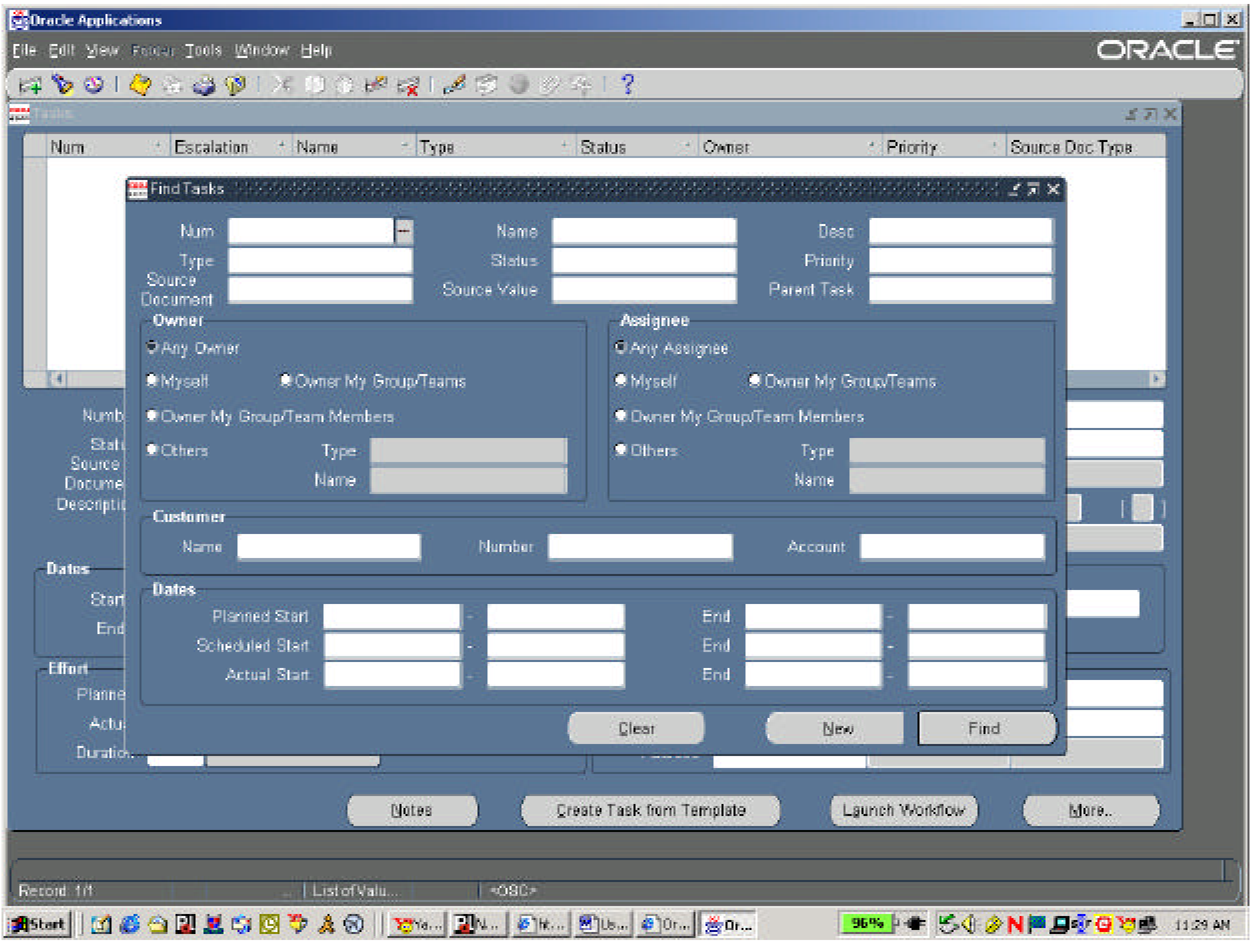
4.4.3 Receipt of a Task by a MATCOM SME (i.e. MATCOM IMs Group)

☞ **Attention:** This section of the document assumes that the user is a MATCOM SME.

To determine what has been "Tasked" to a MATCOM SME, MATCOM SMEs may search for Tasks that have a status of "Awaiting SME ATP". Within the customer support responsibility, a user may navigate to the Task Management > Tasks from the customer support navigator window and open the Tasks menu option.

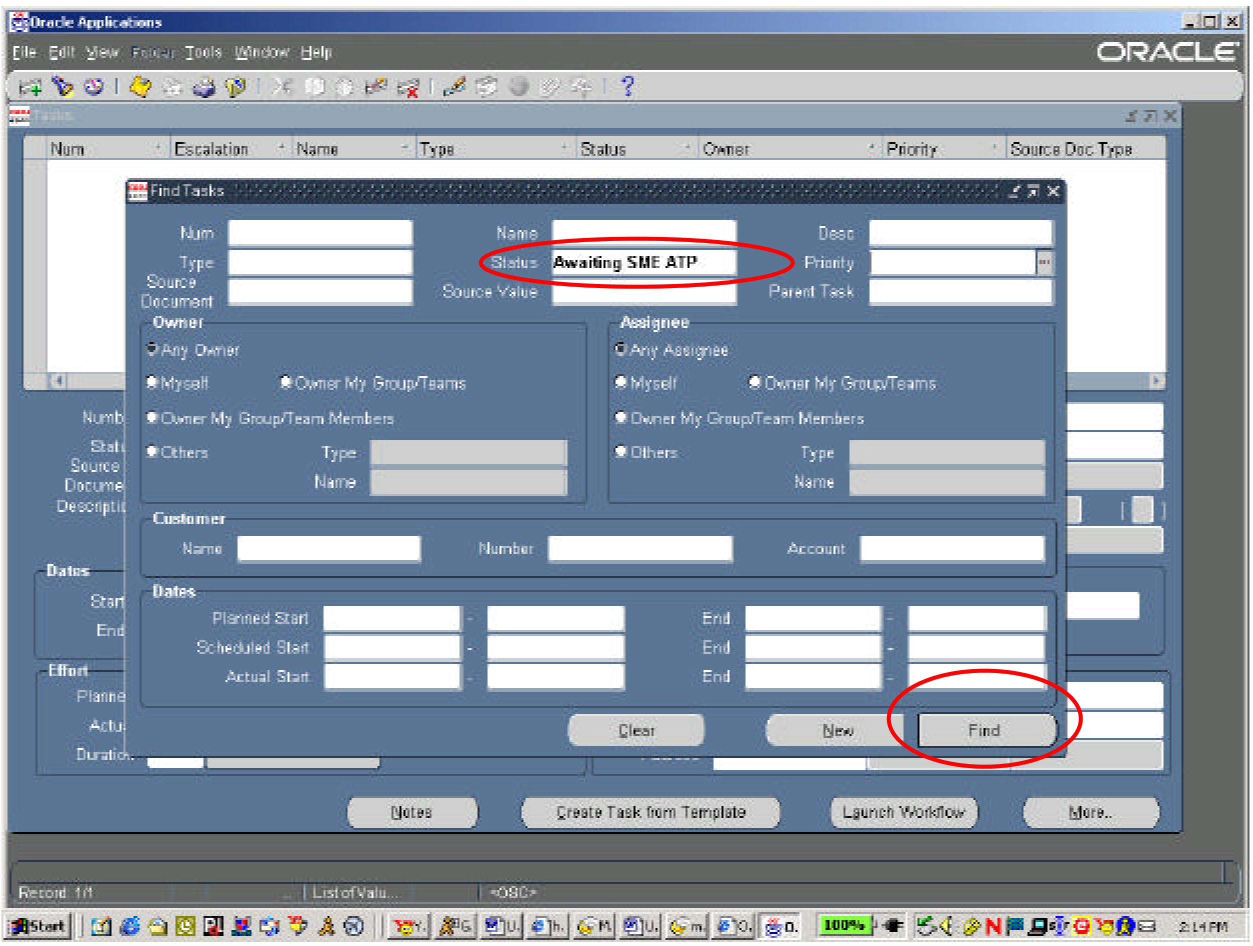

Oracle Applications
File Edit View Folder Tools Window Help
ORACLE
Navigator - Customer Support
Functions
Documents
Task Management:Tasks
Tasks
Universal Work Queue
+ Customer Management
- Service Requests
Create Service Requests
View Service Requests
Workflow Notifications
Create Service Requests
+ Knowledge Base
+ Installed Base
+ Order Capture
+ Resource Management
- Task Management
Tasks
Task Templates
+ Escalation Management
Top Ten List
Open
Record: 1/1
<OSC>
Start
11:28 AM

After opening the Tasks menu option, the user will see the following screen.

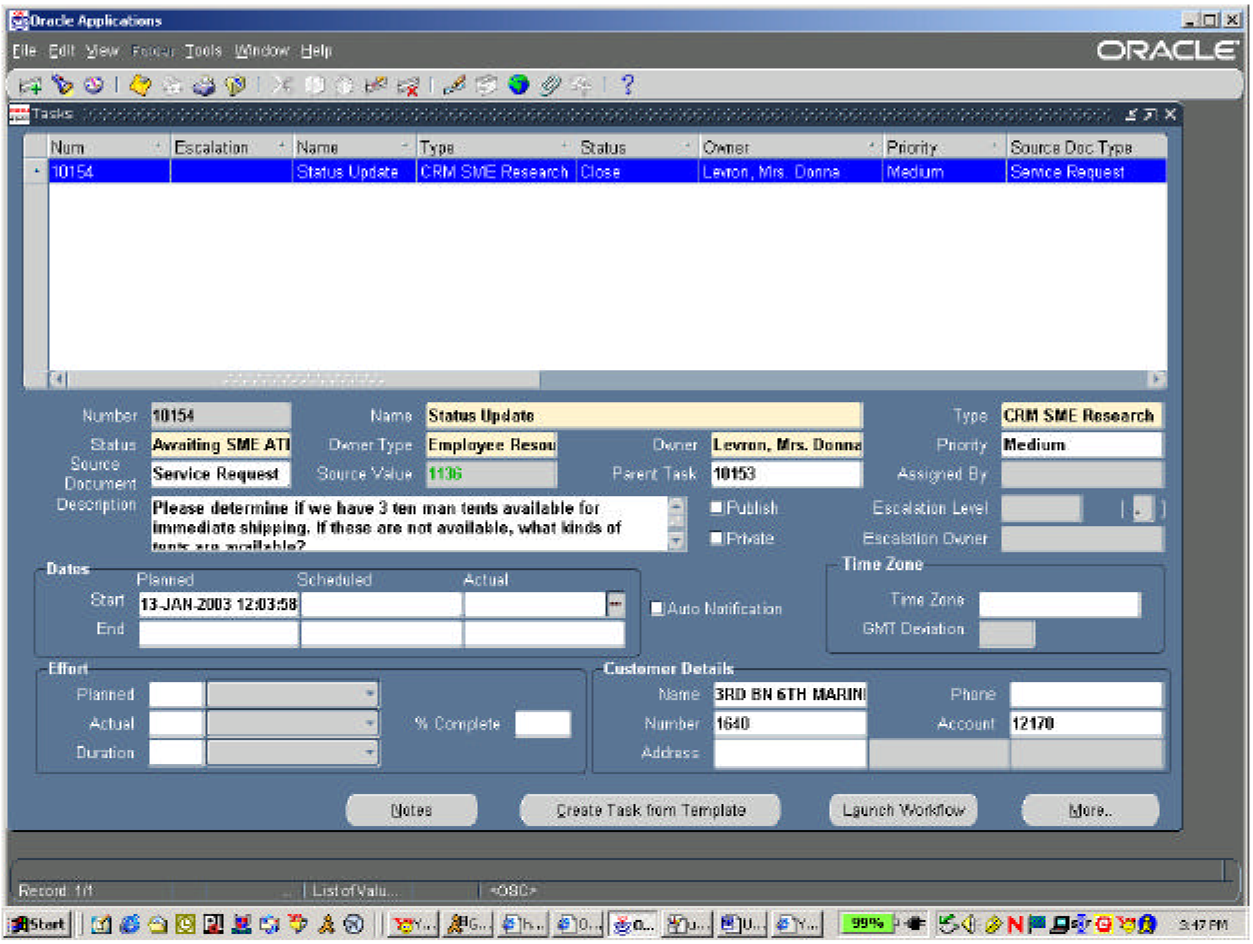


From this screen, the user may select different search criteria. In this case, we are a MATCOM IM and we wish to locate the Tasks that have been assigned to the MATCOM IMs group. To find which tasks are in the queue waiting to be worked, a user may search on the status "Awaiting SME ATP" which signifies that the task has not yet been received by a MATCOM IM and that the task needs to be worked. To perform this search, a user may select the status "Awaiting SME ATP" as the search criteria and then press the 

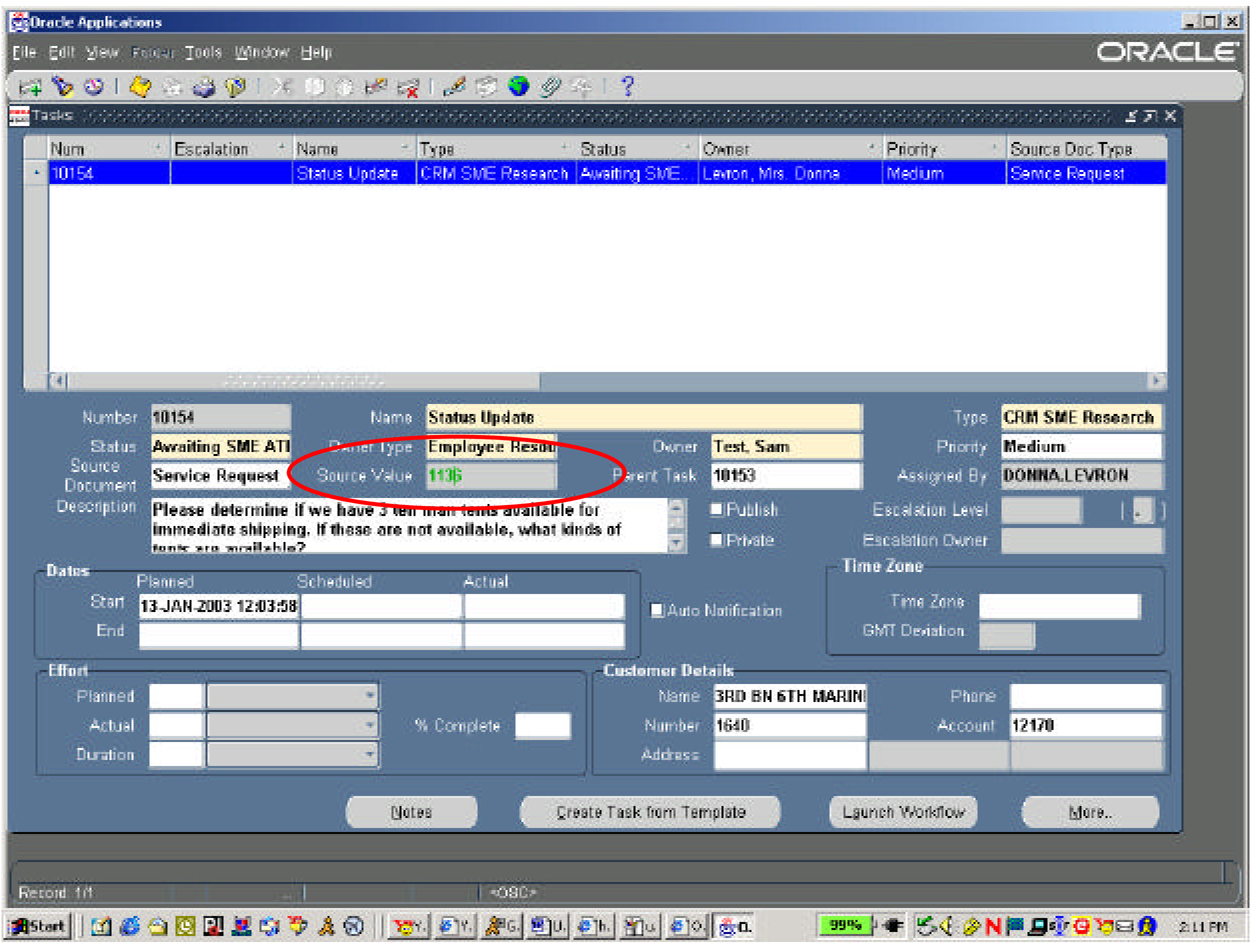
button to execute the search.

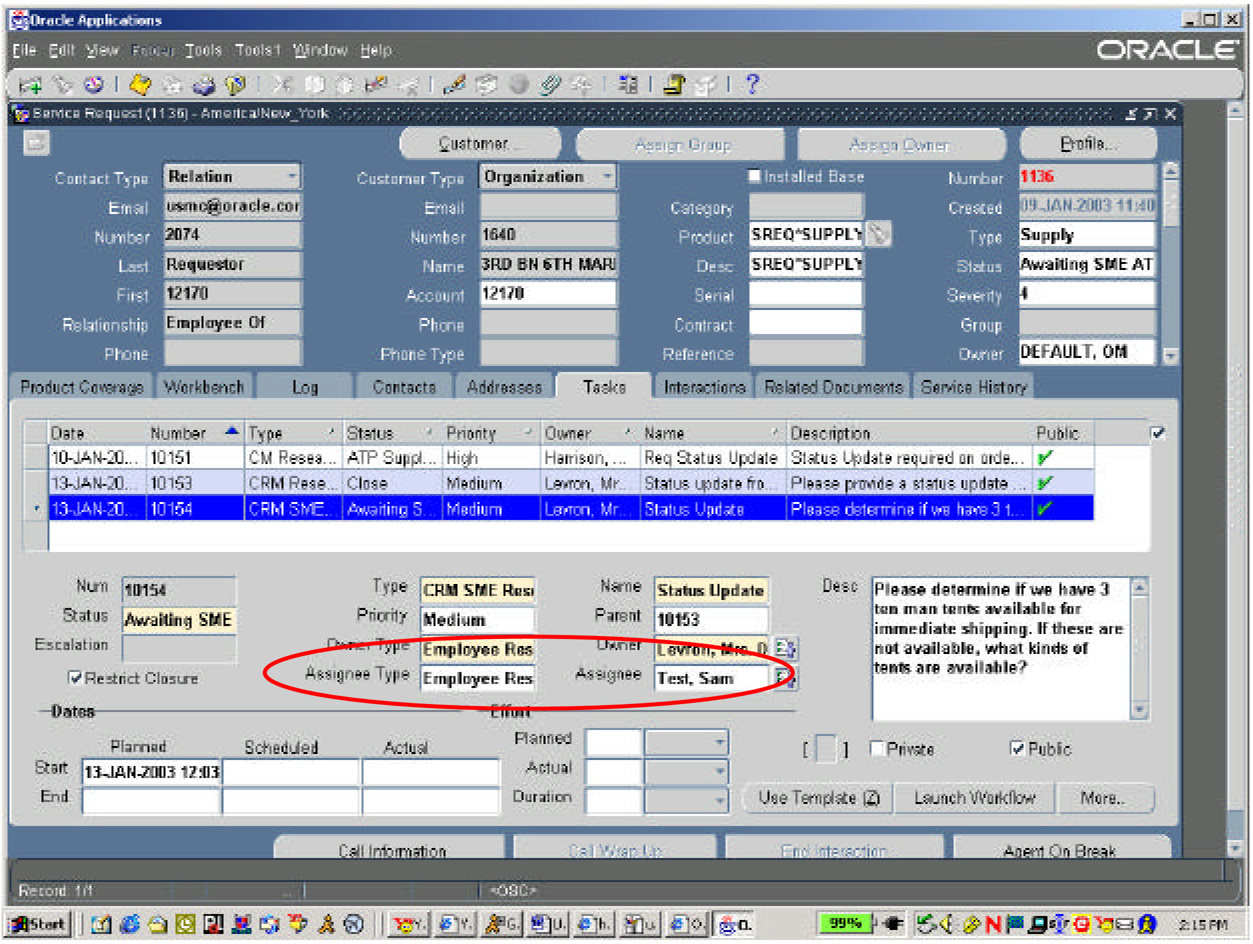


This search will return a results screen that looks like the screen below.

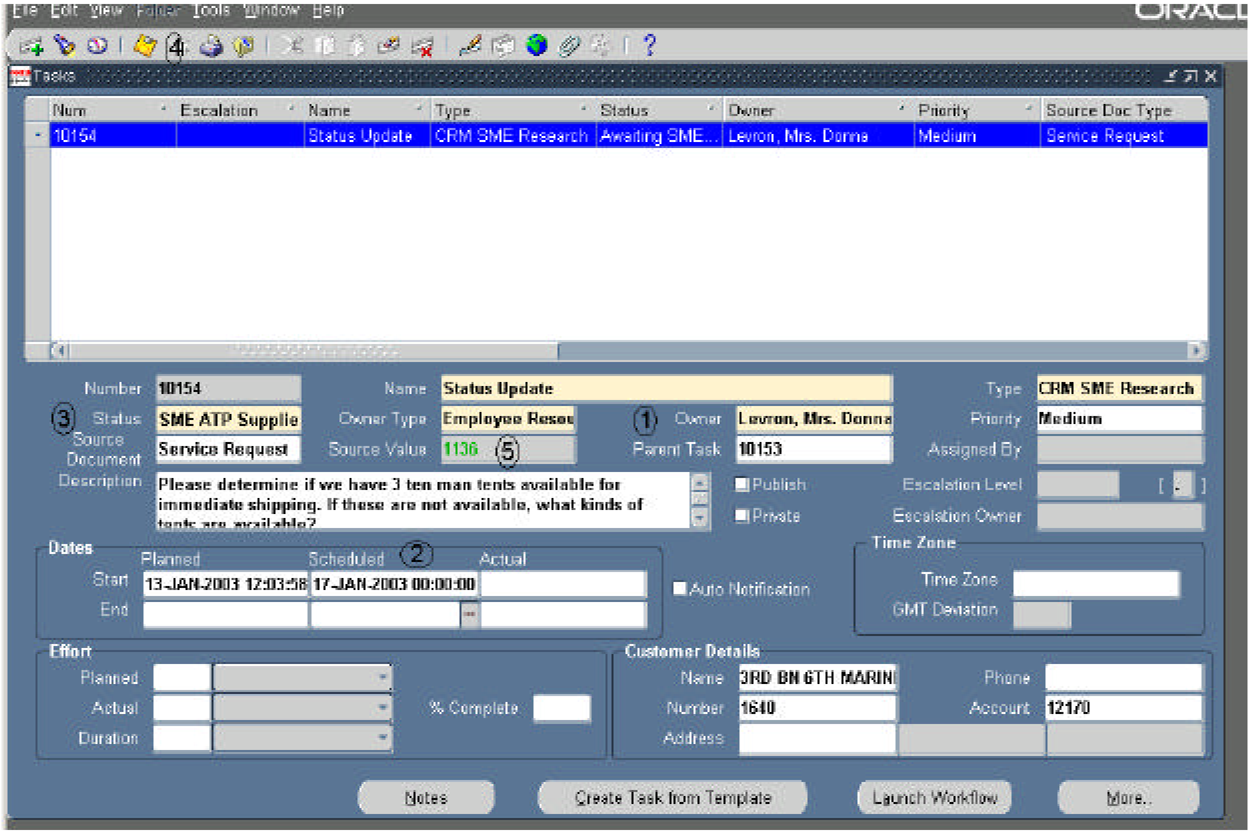


From this screen, the IM may review the task and determine if he/she is capable of completing the task. If the user can complete the task, then he/she will become the assignee of the task. If the user cannot complete the task, then he/she must create a note to the CSE informing him/her of the problem with the task. The IM may become the assignee of the task by selecting the Source Value of the task and navigating to the SR. On the SR, Assignee Type should be changed to “Employee Resource” and the user may select their own name as the Assignee. (NOTE: For the purposes of this example, Sam Test is selected as the MATCOM SME that is assigned to this task.)



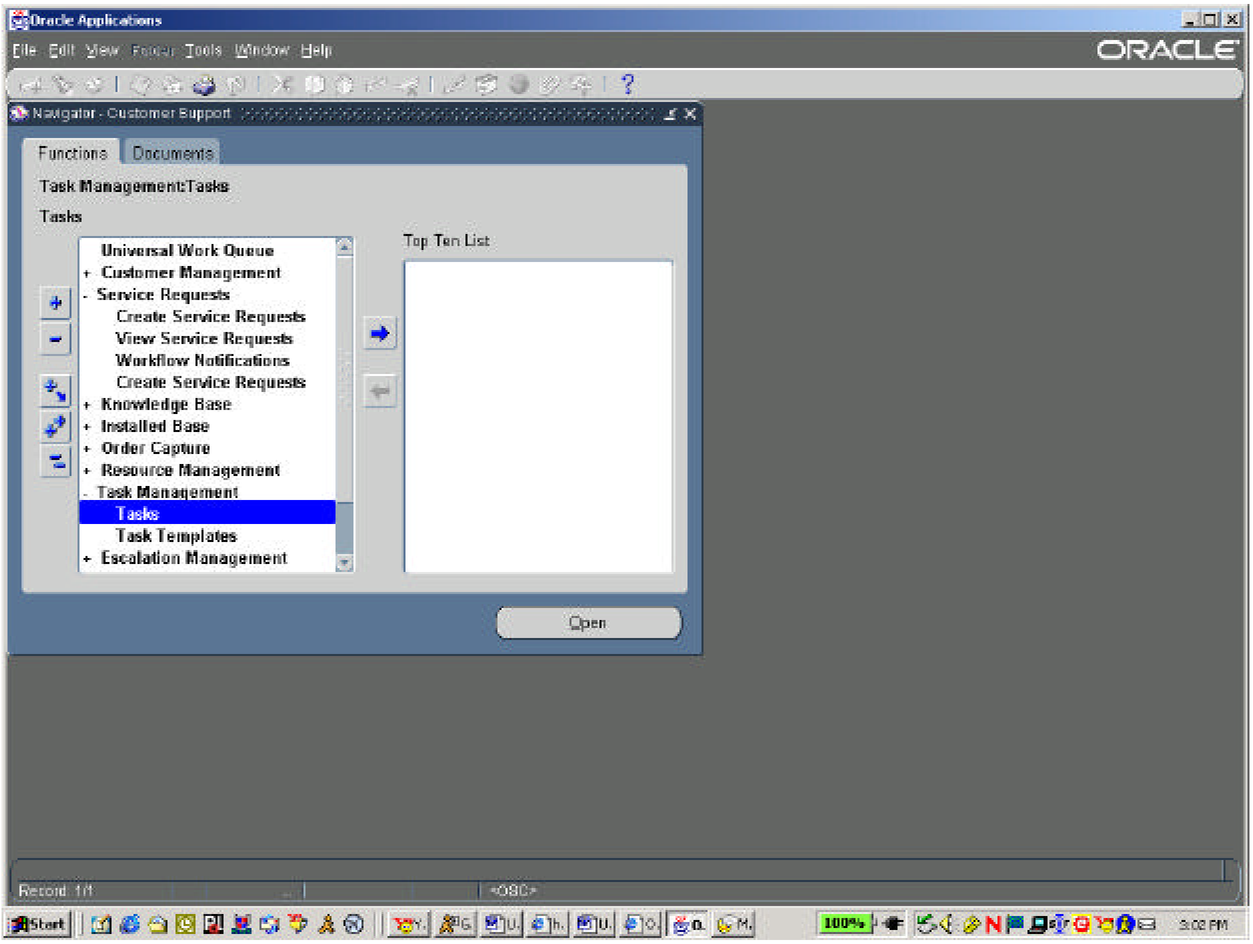

Oracle Applications
File Edit View Folder Tools Tools1 Window Help
ORACLE
Service Request (1136) - America/New_York
Customer...
Assign Group
Assign Owner
Profile...
Contact Type Relation
Email usmc@oracle.cor
Number 2074
Last Requestor
First 12170
Relationship Employee Of
Phone
Customer Type Organization
Email
Number 1640
Name 3RD BN 6TH MAR
Account 12170
Phone
Phone Type
Installed Base
Category
Product SREQ^SUPPLY
Desc SREQ^SUPPLY
Serial
Contract
Reference
Number 1136
Created 09-JAN-2003 11:40
Type Supply
Status Awaiting SME AT
Severity 4
Group
Owner DEFAULT, OM
Product Coverage
Workbench
Log
Contacts
Addresses
Tasks
Interactions
Related Documents
Service History
Date
Number
Type
Status
Priority
Owner
Name
Description
Public
10-JAN-20... 10151 CM Resea... ATP Suppl... High Harrison, ... Req Status Update Status Update required on orde...
13-JAN-20... 10153 CRM Rese... Close Medium Lewton, Mr... Status update fro... Please provide a status update ...
13-JAN-20... 10154 CRM SME... Awaiting S... Medium Lewton, Mr... Status Update Please determine if we have 3 t...
Num 10154
Status Awaiting SME
Escalation
Restrict Closure
Type CRM SME Reso
Priority Medium
Owner Type Employee Res
Assignee Type Employee Res
Name Status Update
Parent 10153
Owner Lewton, Mrs. D
Assignee Test, Sam
Desc
Please determine if we have 3 ten man tents available for immediate shipping. If these are not available, what kinds of tents are available?
Dates
Planned
Scheduled
Actual
Start 13-JAN-2003 12:03
End
Effort
Planned
Actual
Duration
Private
Public
Use Template
Launch Workflow
More...
Call Information
Call Wrap Up
End Interaction
Agent On Break
Record: 1/1
<OSC>
Start
2:15 PM

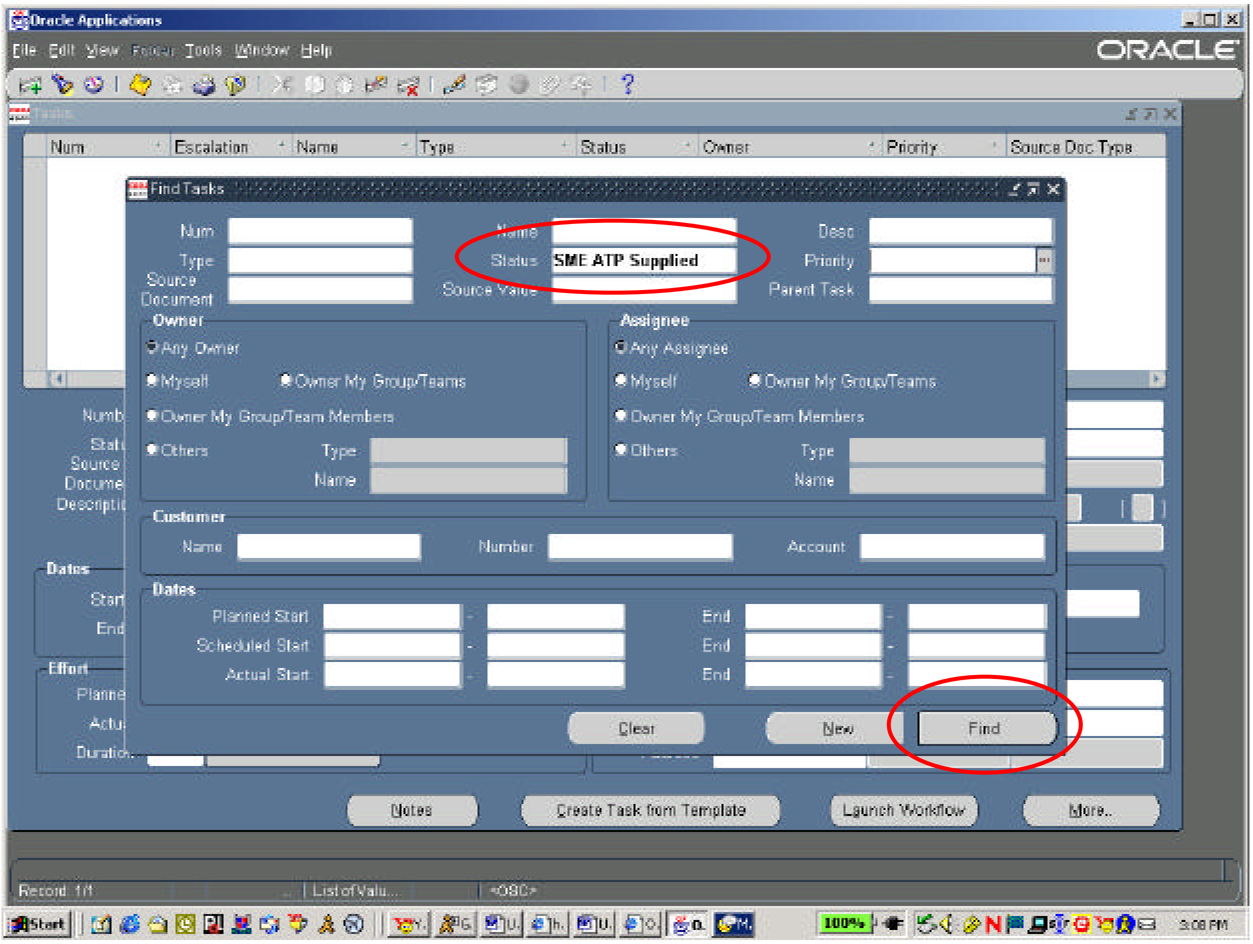
After assigning themselves to the task, the user may close the window and return to the task screen.

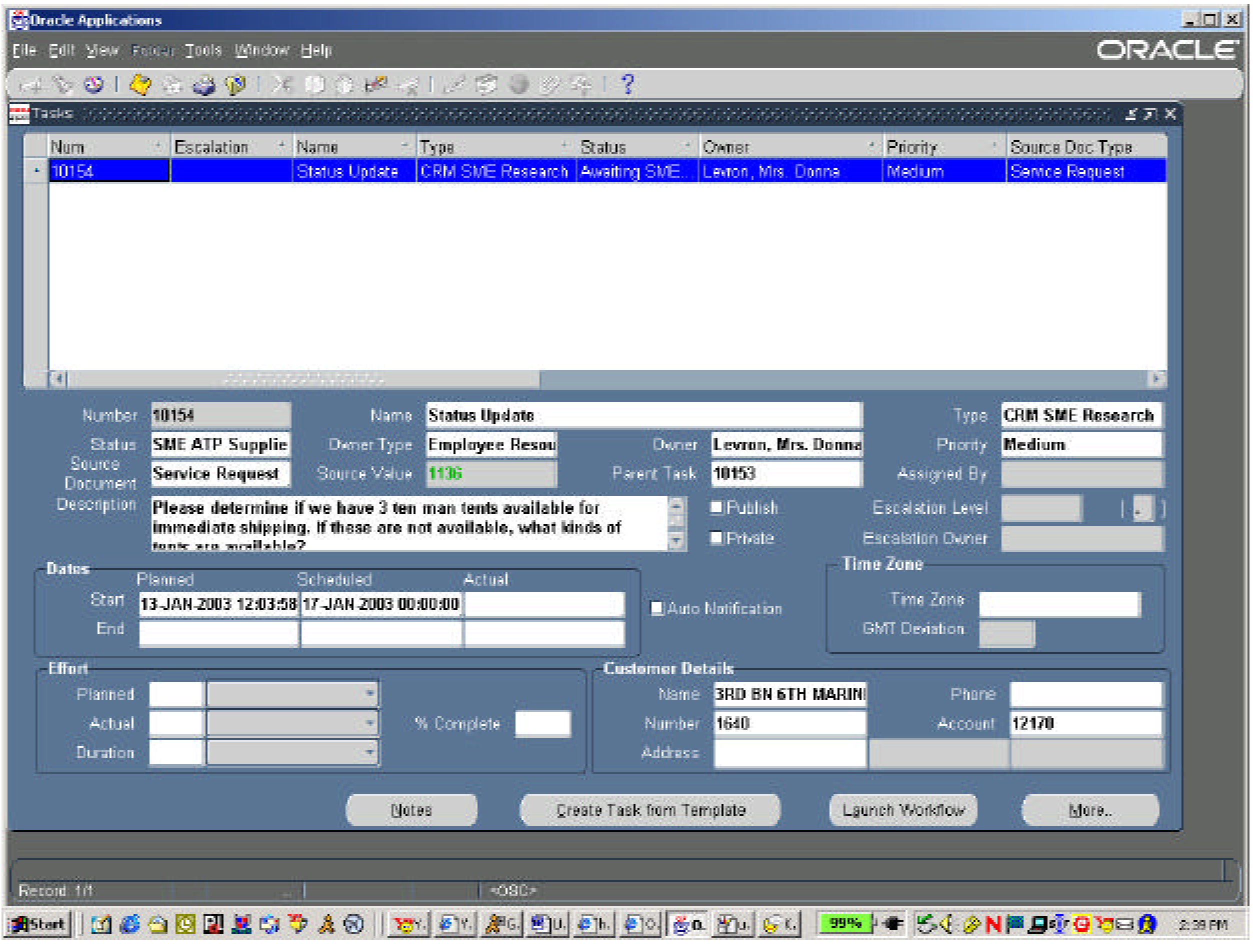


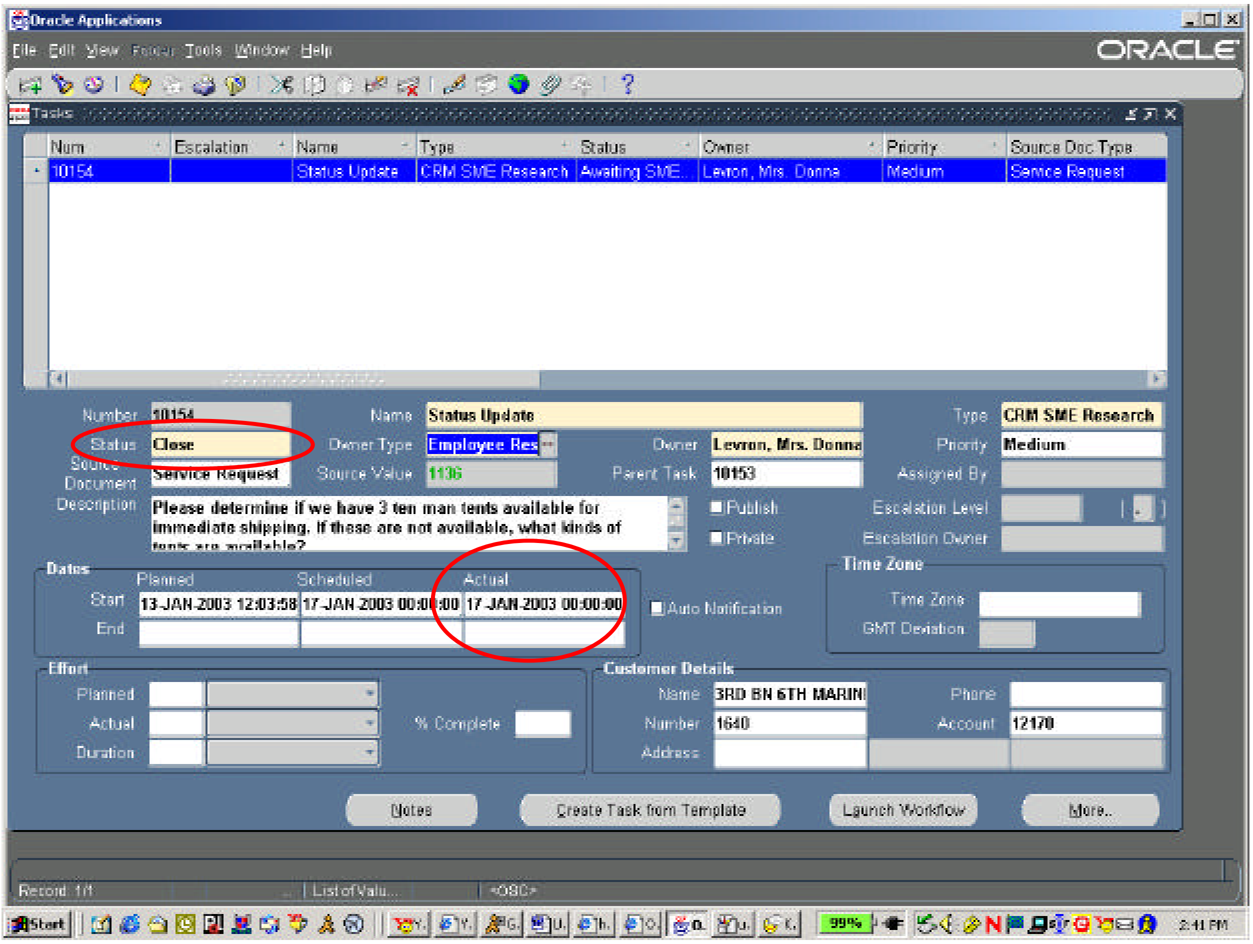
1. Owner – The owner remains Donna Levron because she is the CSE MATCOM representative that will task out this task.
2. Scheduled Date – The SME ATP (Available to Promise) Date needs to be entered
3. Status – Once the SME ATP Date is entered, the status may be changed to SME ATP Supplied
4. Save – This record may be saved to record the changes
5. Source Value – This value is the SR number that this task is attached to. This number is shown in green because it is a hyperlink to the SR. This link may be used to add notes to the SR.

The next step is for the MATCOM IM to supply the actual date that the task is completed and to change the Task Status to “Closed”. The representative may locate the task by searching for tasks with a status of “SME ATP Supplied” in the Task Management > Tasks screen.




Oracle Applications
File Edit View Folder Tools Window Help
ORACLE
Num
Escalation
Name
Type
Status
Owner
Priority
Source Doc Type
Find Tasks
Num
Name
Desc
Type
Status
SME ATP Supplied
Priority
Source Document
Source Value
Parent Task
Owner
Any Owner
Myself
Owner My Group/Teams
Owner My Group/Team Members
Others
Type
Name
Assignee
Any Assignee
Myself
Owner My Group/Teams
Owner My Group/Team Members
Others
Type
Name
Customer
Name
Number
Account
Dates
Planned Start
End
Scheduled Start
End
Actual Start
End
Clear
New
Find
Notes
Create Task from Template
Launch Workflow
More..
Record: 1/1
List of Valu...
<OSC>





4.6 CSE SR STATUS MONITORING

Attention: This section of the document assumes that the user is a CSE

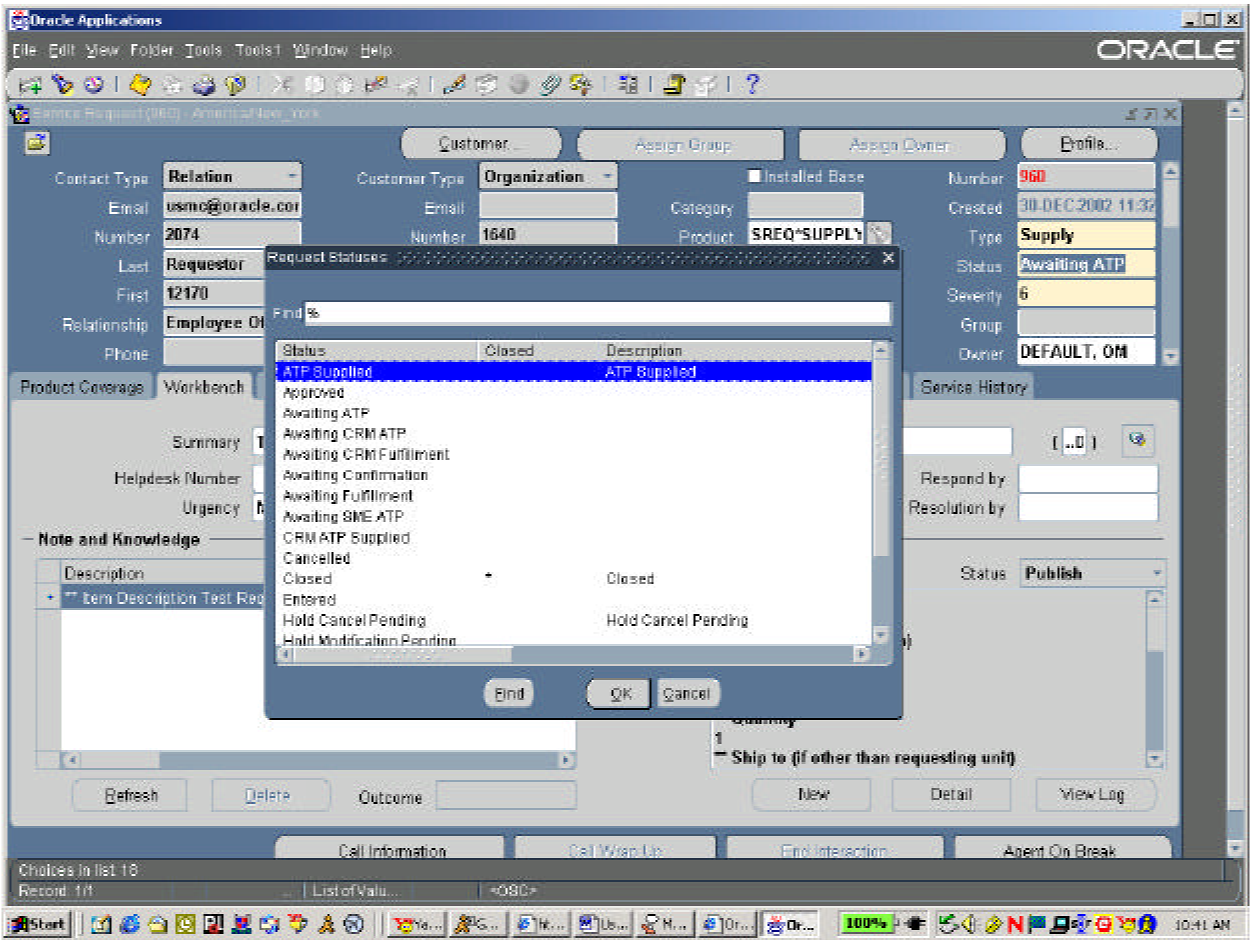
The CSE must *continually* monitor and update the statuses of all of the tasks that he/she has assigned because updating the statuses of the SR provides status updates to the requestor. The status changes that the CSE must monitor are outlined in the table below.

Current Task Status	Next Task Status	Description
ATP Supplied	Closed	Once a task is completed, the status of the task is changed.
Awaiting ATP	ATP Supplied	Once an ATP is supplied, then the status of the task is changed.
Awaiting CRM ATP	CRM ATP Supplied	Once a CRM ATP is Supplied, then the status of the task is changed.
Awaiting SME ATP	SME ATP Supplied	Once a SME ATP is Supplied, then the status of the task is changed.
CRM ATP Supplied	Closed	Once a task is completed, then the status of the task is changed.
Cancelled	N/A	When a task has been cancelled
Closed	N/A	When a task has been completed.
Rejected	N/A	When a task has been rejected.
SME ATP Supplied	Closed	Once a task is completed, then the status of the task is changed.

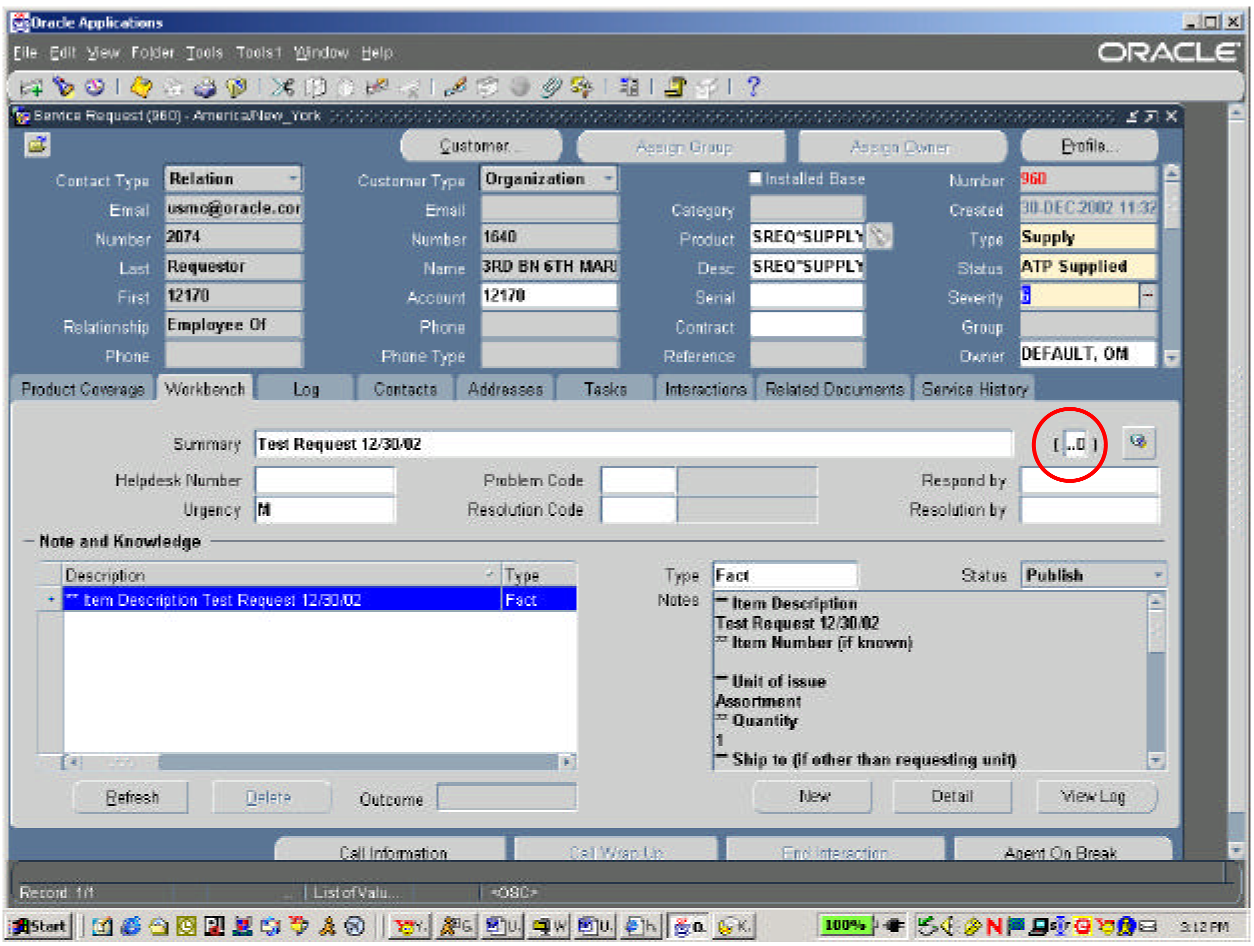
Current SR Status	Next SR Status	Description
Approved	Awaiting ATP	When task is “tasked” to the 2nd FSSG
Approved	Awaiting CRM ATP	When task is “tasked” to MATCOM
Approved	Soft Close	When task is completed by CSE
Approved	Cancelled	When task is rejected and cancelled.
ATP Supplied	Soft Close	Once all tasks associated with an SR have been completed.
Awaiting ATP	ATP Supplied	Once the ATP of all tasks associated with an SR have been supplied.
Awaiting CRM ATP	CRM ATP Supplied	Once the CRM ATP of all tasks associated with an SR has been supplied.
CRM ATP Supplied	Closed	Once a task is completed, then the status of the task is changed.
Cancelled	N/A	When a SR has been cancelled
Soft Close	Closed	When the fulfillment of an SR has been approved by the requestor.
Closed	N/A	When an SR has been hard closed.
Rejected	N/A	When an SR has been rejected from being fulfilled.

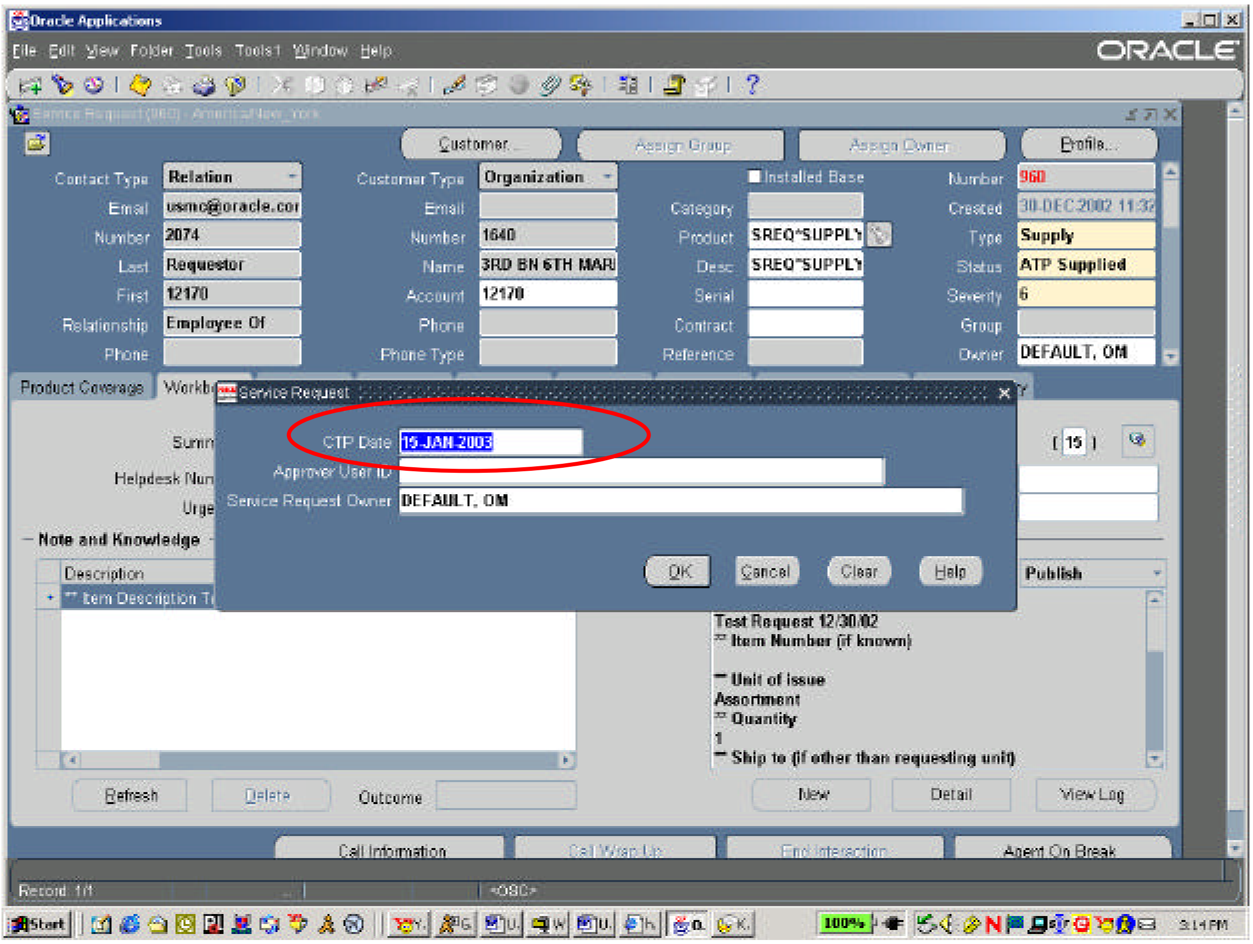
Once all of the tasks that he/she has assigned have a status of “ATP Supplied” or “CRM ATP Supplied”, the CSE can change the status of the SR to “ATP Supplied” which will alert the requestor that the SR is currently being researched. The CSE may locate applicable SRs by querying on a specific SR number or by searching for SRs with a status of "Awaiting ATP" where _all_ associated _tasks_ contain a status "ATP Supplied" or "CRM ATP Supplied"

Attention: It is important to keep in mind that if a SR has more than one task associated to it than _all_ tasks must have a status of "ATP Supplied" _before_ the SR status can be changed to "ATP Supplied."



Once the status of the SR has been changed to "ATP Supplied" or "CRM ATP Supplied" the CSE may enter the CTP (Capable to Promise) Date. The CTP Date field is found in the SR flexfield. This date is the day that the SR can be completed by. The SR flexfield is shown in below.

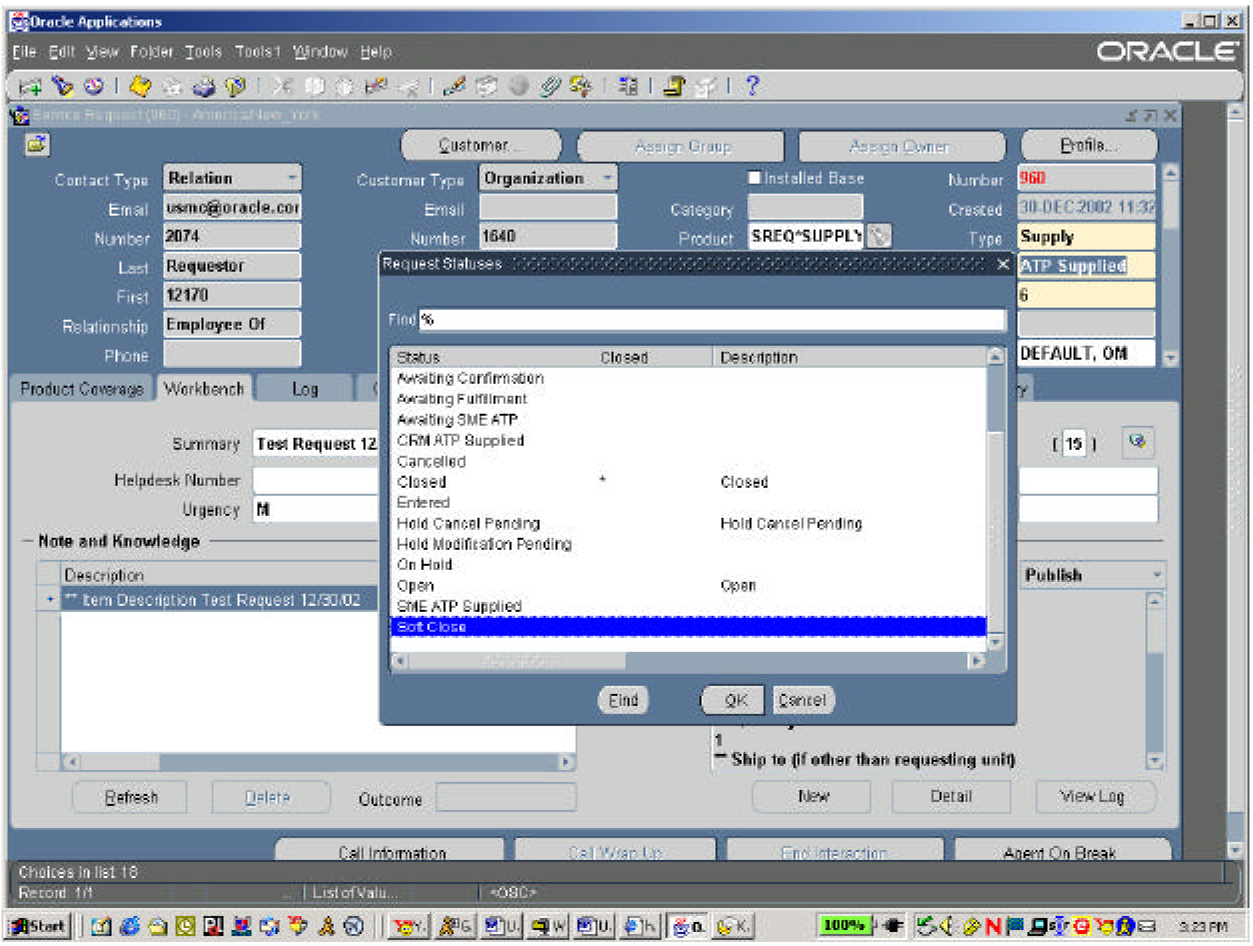



Oracle Applications
File Edit View Folder Tools Tools1 Window Help
ORACLE
Customer...
Assign Group
Assign Owner
Profile...
Contact Type
Relation
Email
usmc@oracle.cor
Number
2074
Last
Requestor
First
12170
Relationship
Employee Of
Phone
Customer Type
Organization
Email
Number
1640
Name
3RD BN 6TH MAR
Account
12170
Phone
Phone Type
Installed Base
Category
Product
SREQ^SUPPLY
Desc
SREQ^SUPPLY
Serial
Contract
Reference
Number
960
Created
30-DEC-2002 11:32
Type
Supply
Status
ATP Supplied
Severity
6
Group
Owner
DEFAULT, OM
Product Coverage
Service Request
CTP Date
15-JAN-2003
Approver User ID
Service Request Owner
DEFAULT, OM
OK
Cancel
Clear
Help
Note and Knowledge
Description
Publish
Test Request 12/30/02
** Item Number (if known)
** Unit of Issue
Assortment
** Quantity
1
** Ship to (if other than requesting unit)
Refresh
Delete
Outcome
New
Detail
View Log
Call Information
Call Wrap Up
End Interaction
Agent On Break
Record: 1/1
<OSC>

4.7 Closing an SR

Attention: This section of the document assumes that the user is a CSE

After all tasks on an SR have been completed and the CTP Date has been supplied, the CSE may change the status of the SR to "Soft Close". This will signify to the requestor that the SR has been fulfilled and ask for the requestor's approval of the fulfillment.



5.0 List of Values Definitions

5.1 SERVICE REQUEST LOVS

Field	Value	Definition
Status	ATP Supplied	Available to Promise (ATP) Date Supplied
	Approved	Approved
	Awaiting ATP	Awaiting Available to Promise (ATP) Date
	Awaiting CRM ATP	Awaiting Customer Relationship Management (CRM) Available to Promise (ATP) Date
	Awaiting CRM Fulfillment	Awaiting Customer Relationship Management (CRM) Fulfillment
	Awaiting Confirmation	Awaiting Confirmation
	Awaiting Fulfillment	Awaiting Fulfillment
	Awaiting SME ATP	Awaiting Subject Matter Expert (SME) Available to Promise (ATP) Date
	CRM ATP Supplied	Customer Relationship Management (CRM) Available to Promise (ATP) Date Supplied
	Cancelled	SR Cancelled
	Closed	Closed
	Entered	SR has been Entered
	Hold Cancel Pending	Hold Cancel Pending
	Hold Modification Pending	Hold Modification Pending
	On Hold	On Hold
	Open	Open
	SME ATP Supplied	Subject Matter Expert (SME) Available to Promise (ATP) Date Supplied
	Soft Close	SR is closed, but can be re-opened

Field	Value	Definition
Problem Code	Cataloging Discrepancy	
	Change ESD	
	IROAN	
	MOA	
	Offline Requisition	
	Price Change	
	Product Quality Discrepancy	
	Req Fulfillment Update	
	Request Pubs	
	Requisition Billing Dispute	
	SLEP	
	Stock Availability	
	Supply Discrepancy	
	TE Fulfillment	
	ULSS Technical	
	WIR Broken Parts	
	WIR Excess Parts	
	Warranty Issue	

Field	Value	Definition
Resolution Code		

5.2 Task LOVs

Field	Value	Definition
Status	ATP Supplied	Available to Promise (ATP) Date Supplied
	Accepted	Accepted

Field	Value	Definition
	Assigned	Assigned
	Auto in Planning	Auto in Planning
	AutoReject	Automatically Rejected
	Awaiting ATP	Awaiting Available to Promise (ATP) Date
	Awaiting CRM ATP	Awaiting Customer Relationship Management (CRM) Available to Promise (ATP) Date
	Awaiting CRM Fulfillment	Awaiting Customer Relationship Management (CRM) Fulfillment
	Awaiting Fulfillment	Awaiting Fulfillment
	Awaiting SME ATP	Awaiting Subject Matter Expert (SME) Available to Promise (ATP) Date
	Awaiting SME Fulfillment	Awaiting Subject Matter Expert (SME) fulfillment
	CRM ATP Supplied	Customer Relationship Management (CRM) Available to Promise (ATP) Date Supplied
	Cancelled	SR Cancelled
	Close	Task is Closed
	Closed	Debrief is reviewed and pushed to charges, install base, knowledge base, etc.
	Completed	Task is done and frozen
	Failed	The task failed to complete successfully
	In Planning	Resource is assigned to the task, but the planner is still optimizing the schedule
	In Progress	Task is in Progress
	Interrupted	Interrupted
	Invited	Assignee is invited to task
	Not Started	Task Not Started
	On Hold	On Hold
	Open	Open
	Planned	Planned
	Rejected	Rejected
	SME ATP Supplied	Subject Matter Expert (SME) Available to Promise (ATP)

Field	Value	Definition
		Date Supplied
	Unassigned	Tasks can be viewed by planners and picked up to be planned
	Working	Task is assigned and resource is working on it

Field	Value	Definition
Type	CM Research	
	CRM Research	Customer Relationship Management (CRM) Research
	CRM SME Research	Customer Relationship Management (CRM) Subject Matter Expert (SME) Research
	CSE Research	Customer Service Executor Research
	Engineering Service	Engineering Task
	Health Service	Health Service Task
	Maintenance	Maintenance Task
	Other	Other type of Task
	Product	Product related Task
	Supply	Supply related Task
	Transportation	Transportation related Task

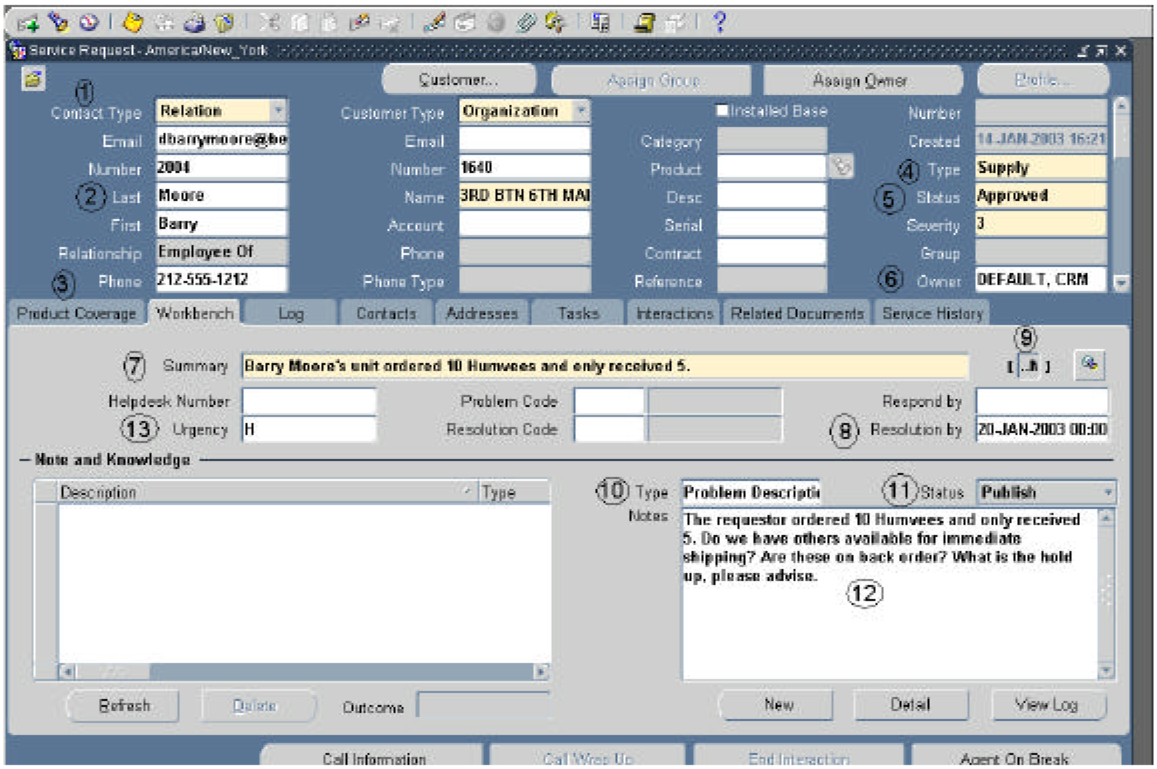
Field	Value	Definition
Priority	High	High Priority Task
	Low	Low Priority Task
	Medium	Medium Priority Task

Field	Value	Definition
Owner Type/Assignee Type	Employee Resource	Individual Employee Resource
	Group Resource	A Group of Resource
	Supplier Contact	
	Team Resource	

6.0 Non-OA Compliant Business Process

This section is to provide guidance for users when non-OA compliant processes are used by user groups that are not supported through the pilot implementation.

6.1 Customer and Contact Information Exists

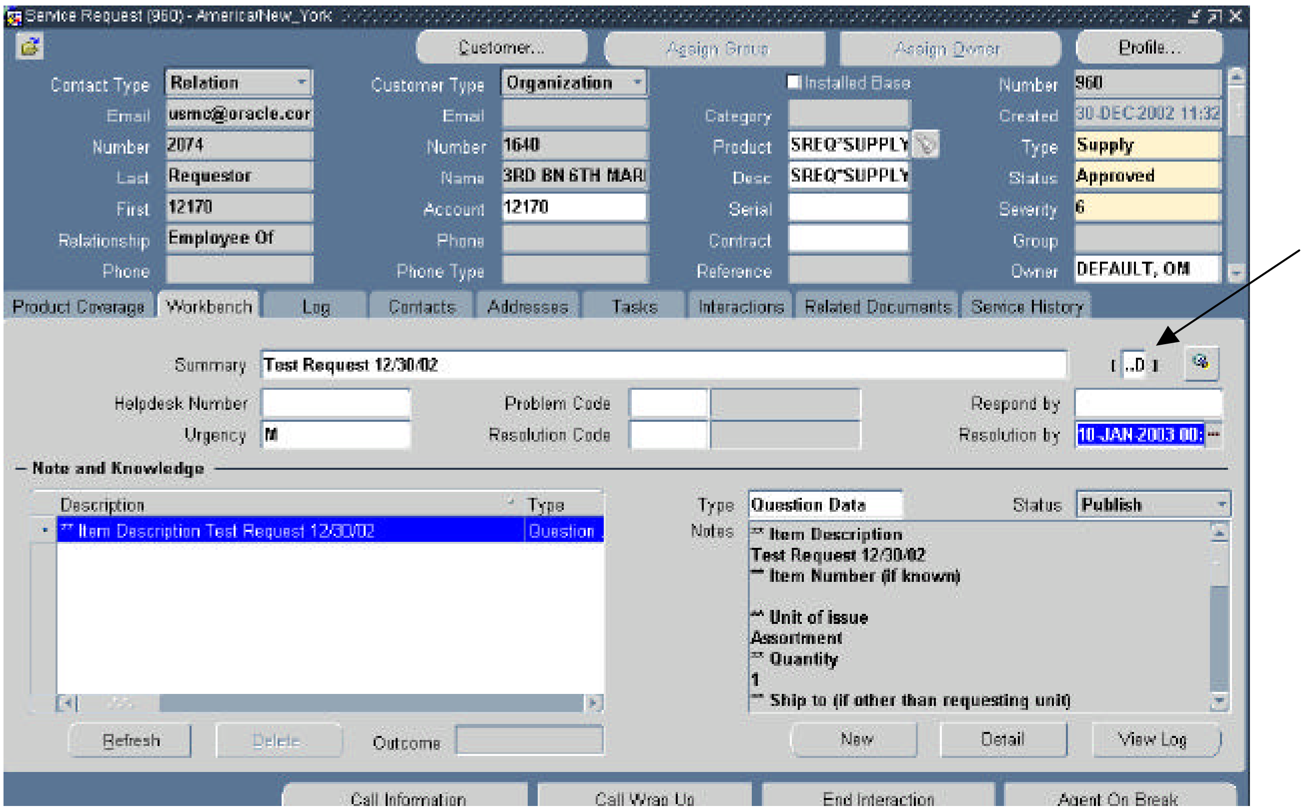


1. Contact Type – Select Relation
2. Last – Populate the last name of the requestor and then the other relevant fields will automatically populate.

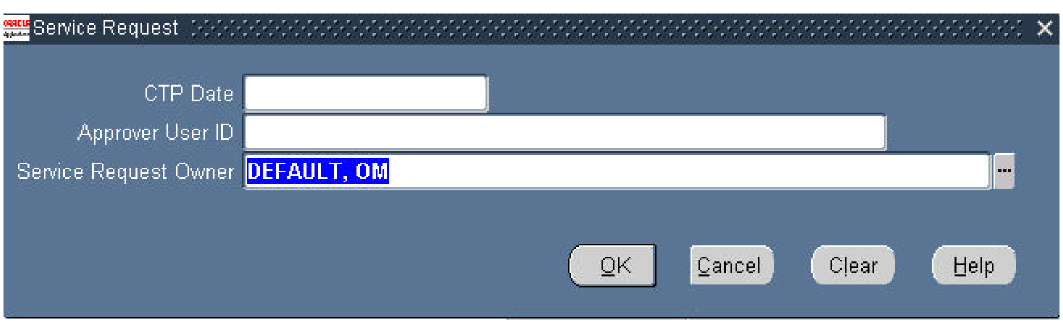
> **Attention:** Once a requestor's last name is selected the other contact information fields will populate automatically. If these fields do not automatically, information cannot be simply inserted into the fields. Instead, the requestor will need to be setup as a requestor before the SR is created.

3. Phone – The phone LOV should be selected and the phone number will populate.
4. Type – The type field should be populated with the correct type of request.
5. Status – Status field should be changed to "approved" upon initial creation of the SR.

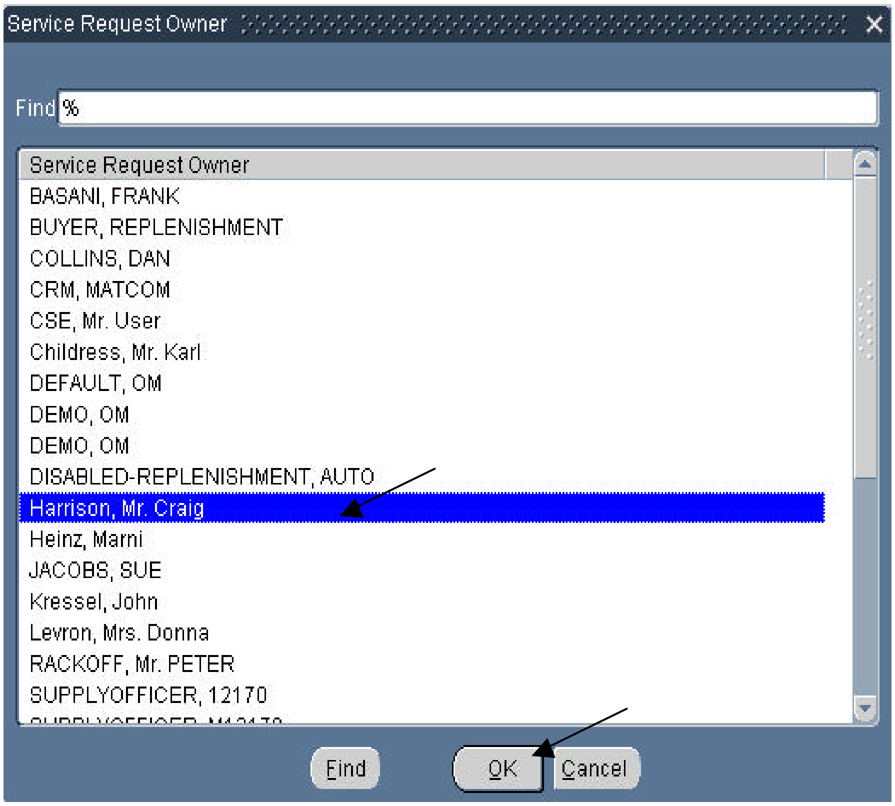
6. Owner – DEFAULT, CRM should be selected as the owner for all SRs entered directly into TeleService.
7. Summary – A summary of the SR is entered.
8. Resolution by – The date when the request should be resolved by is entered.
9. Owner Flexfield – The owner of the SR is populated



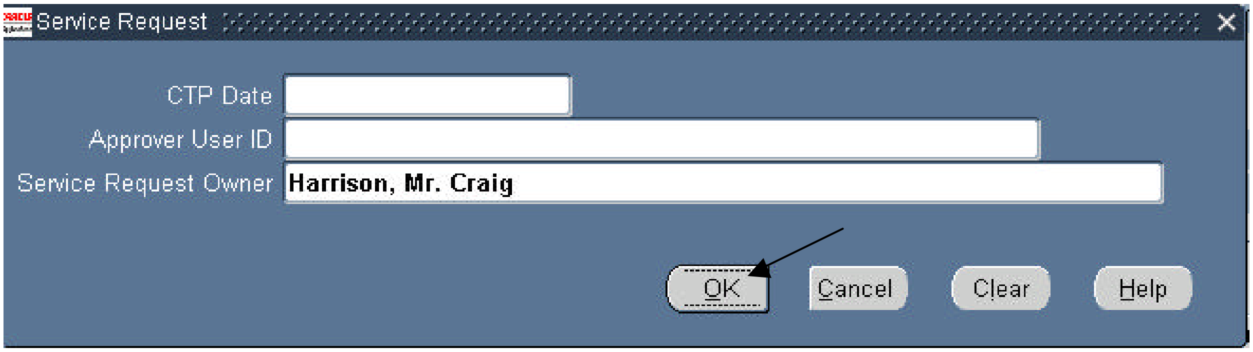
The following pop-up form will appear:



Click on the LOV icon in the Service Request Owner field to select your name in the list of values window. Once you have selected your name click on the OK button to exit the search window.



Click on the OK button in the Service Request flexfield after you have selected your name from the LOV window.



After exiting the flexfield, click on the  Button in the menu area to save your work.

10. Type – The type of note that will be generated.
11. Status – A status of publish is selected.
12. Description – A description of the SR is entered.
13. Urgency – An urgency of need is selected.